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ABSTRACT

This document, which is intended as a guide for workforce preparation program providers, details the Illinois occupational skill standards for programs preparing students for employment in the meeting professional occupational cluster. It begins with a brief overview of the Illinois perspective on occupational skill standards and credentialing, the process used to develop the skill standards, assumptions underlying the standards, and performance skill levels. Presented next are skill standards for 69 tasks related to the following aspects of planning and organizing meetings: program planning; meeting evaluation and reporting; financial management; site and facility selection; housing and reservations; transportation; registration and information services; shipping procedures; meeting and function rooms; exhibits; food and beverages; audiovisuals and teleconferencing; promotion and publicity; and preconvention briefings. Each skill standard statement contains the following components: (1) the actual skill standard (including the conditions of performance, work to be performed, and performance criteria); (2) performance elements; and (3) performance assessment criteria. Appended are the following: a glossary; lists of Illinois Occupational Skill Standards and Credentialing Council, Hospitality Subcouncil, and Meeting Professional Cluster Standards Development Committee members; and a list of necessary workplace skills. (MN)

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OCCUPATIONAL
SKILL
STANDARDS

MEETING PROFESSIONAL CLUSTER

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ILLINOIS OCCUPATIONAL SKILL STANDARDS

MEETING PROFESSIONAL CLUSTER

Endorsed for Illinois
by the
Illinois Occupational Skill Standards
and Credentialing Council

A MESSAGE FROM THE ILLINOIS OCCUPATIONAL SKILL STANDARDS AND CREDENTIALING COUNCIL

Preparing youth and adults to enter the workforce and to be able to contribute to society throughout their lives is critical to the economy of Illinois. Public and private interest in establishing national and state systems of industry-driven skill standards and credentials is growing in the United States, especially for occupations that require less than a four-year college degree. This interest stems from the understanding that the United States will increasingly compete internationally and the need to increase the skills and productivity of the front-line workforce. The major purpose of skill standards is to promote education and training investment and ensure that this education and training enables students and workers to meet industry standards that are benchmarked to our major international competitors.

The Illinois Occupational Skill Standards and Credentialing Council (IOSSCC) has been working with industry subcouncils, the Illinois State Board of Education and other partnering agencies to adopt, adapt and/or develop skill standards for high-demand occupations. Skill standards products are being developed for a myriad of industries, occupational clusters and occupations. This document represents the collaborative effort of the Hospitality Subcouncil and the Meeting Professional Cluster Skill Standards Development Committee.

These skill standards will serve as a guide to workforce preparation program providers in defining content for their programs and to employers to establish the skills and standards necessary for job acquisition. These standards will also serve as a mechanism for communication among education, business, industry and labor.

We encourage you to review these standards and share your comments. This effort has involved a great many people from business, industry and labor. Comments regarding their usefulness in curriculum and assessment design, as well as your needs for in-service and technical assistance in their implementation are critical to our efforts to move forward and improve the documents.

Questions concerning this document may be directed to:

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We look forward to your comments.

Sincerely,

The Members of the IOSSCC

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THE ILLINOIS PERSPECTIVE

The Occupational Skill Standards Act (PA 87-1210) established the nine-member Illinois Occupational Skill Standards and Credentialing Council (IOSSCC). Members of the IOSSCC represent business, industry and labor and are appointed by the Governor or State Superintendent of Education. The IOSSCC, working with the Illinois State Board of Education, Illinois Community College Board, Illinois Board of Higher Education, Illinois Department of Employment Security and Illinois Department of Commerce and Community Affairs, has created a common vision for workforce development in Illinois.

VISION

It is the vision of the IOSSCC to develop a statewide system of industry defined and recognized skill standards and credentials for all major skilled occupations providing strong employment and earnings opportunities in Illinois.

The IOSSCC endorses occupational skill standards and credentialing systems for occupations that

- require basic workplace skills and technical training,
- provide a large number of jobs with either moderate or high earnings, and
- provide career advancement opportunities to related occupations with moderate or high earnings.

Subcouncils and Standards Development Committees

Under the direction of the IOSSCC, and in cooperation with industry organizations and associations, industry subcouncils have been formed to review, approve and promote occupational skill standards and credentialing systems. The industry subcouncils are: Agriculture and Natural Resources; Applied Science and Engineering;* Business and Administrative Information Services; Communications; Construction;* Education and Training Services;* Energy and Utilities;* Financial Services; Health and Social Services; Hospitality; Legal and Protective Services;* Manufacturing; Marketing and Retail Trade; and Transportation, Distribution and Logistics. (*Indicates subcouncils identified for future development.)

Standards development committees are composed of business, labor and education representatives who are experts in the related occupational cluster. They work with the product developer to

- develop or validate occupational skill standards,
- identify related academic skills,
- develop or review assessment or credentialing approaches, and
- recommend endorsement of the standards and credentialing system to the industry subcouncil.

Expected Benefits

The intent of skill standards and credentialing systems is to promote education and training investment and ensure that students and workers are trained to meet industry standards that are benchmarked to the state's major international competitors. Skill standards and credentialing systems have major benefits that impact students and workers, employers and educators in Illinois.

Student and Worker Benefits

- Help workers make better decisions about the training they need to advance their careers
- Allow workers to communicate more effectively to employers what they know and can do
- Improve long-term employability by helping workers move more easily among work roles
- Enable workers to help their children make effective academic and career and technical decisions

Employer Benefits

- Focus the investment in training and reduce training costs
- Boost quality and productivity and create a more flexible workforce
- Improve employee retention
- Improve supplier performance
- Enlarge the pool of skilled workers

Educator Benefits

- Keep abreast of a rapidly changing workplace
- Contribute to curriculum and program development
- Provide students with better career advice
- Strengthen the relationship between schools and local businesses
- Communicate with parents because educators have up-to-date information about industry needs

The IOSSCC is currently working with the Illinois State Board of Education and other state agencies to integrate the occupational standards with the Illinois Learning Standards which describe what students should know and be able to do as a result of their education. The IOSSCC is also working to integrate workplace skills—problem solving, critical thinking, teamwork, etc.—with both the Illinois Learning Standards and the Illinois Occupational Skill Standards.

IOSSCC Requirements for Occupational Skill Standards

Illinois Occupational Skill Standards define what an individual should know and the expected level of performance required in an occupational setting. The standards focus on the most critical work performances for an occupation or occupational area.

Endorsed Occupations

Any occupational skill standards and credentialing system seeking IOSSCC endorsement must

- represent an occupation or occupational cluster that meets the criteria for IOSSCC endorsement, including economic development, earnings potential and job outlook;
- address both content and performance standards for critical work functions and activities for an occupation or occupational area;
- ensure formal validation and endorsement by a representative group of employers and workers within an industry;
- provide for review, modification and revalidation by an industry group a minimum of once every five years;
- award credentials based on assessment approaches that are supported and endorsed by the industry and consistent with nationally recognized guidelines for validity and reliability;
- provide widespread access and information to the general public in Illinois; and
- include marketing and promotion by the industry in cooperation with the partner state agencies.

Recognized Occupations

Occupations that do not meet the earnings criteria for IOSSCC endorsement but are part of an occupational cluster that is being developed may be presented for recognition by the IOSSCC. IOSSCC members encourage individuals to pursue occupational opportunities identified as endorsed occupations. Examples of occupations that do not meet the endorsement criteria, but have been recognized by the IOSSCC are Certified Nurse Assistant and Physical Therapy Aide.

Skill Standards Components

Illinois Occupational Skill Standards must contain the following components:

- Performance Area
- Performance Skill
- Skill Standard
- Performance Elements
- Performance Assessment Criteria

The IOSSCC further identified three components (*Conditions of Performance, Work to be Performed and Performance Criteria)* of the Skill Standard component as critical work functions for an occupation or industry/occupational area. The sample format for Illinois Occupational Skill Standards on the following page provides a description of each component of an occupational skill standard.

The sample format also illustrates the coding at the top of each page identifying the state, fiscal year in which standards were endorsed, Subcouncil abbreviation, cluster abbreviation and standard number. For example, the twenty-fifth skill standard in the Meeting Professional Cluster, which has been developed by the Hospitality Subcouncil, would carry the following coding: IL.01.HOSP.MPC.25.

SUMMARY OF WORK TO BE PERFORMED. SUMMARY IS BRIEF AND BEGINS WITH AN ACTION VERB.

IL.FY.SUBCOUNCIL. CLUSTER. STANDARD NO.

PERFORMANCE AREA

SKILL STANDARD

CONDITIONS OF PERFORMANCE

A comprehensive listing of the information, tools, equipment and other resources provided to the person(s) performing the work.

WORK TO BE PERFORMED

An overview of the work to be performed in demonstrating the performance skill standard. This overview should address the major components of the performance. The detailed elements or steps of the performance are listed under "Performance Elements."

PERFORMANCE CRITERIA

The assessment criteria used to evaluate whether the performance meets the standard. Performance criteria specify product/outcome characteristics (e.g., accuracy levels, appearance, results, etc.) and process or procedure requirements (e.g., safety requirements, time requirements, etc.).

PERFORMANCE ELEMENTS

Description of the major elements or steps of the overall performance and any special assessment criteria associated with each element.

PERFORMANCE ASSESSMENT CRITERIA

Listing of required testing, certification and/or licensing.

Product and process used to evaluate the performance of the standard.

PRODUCT

Description of the product resulting from the performance of the skill standard.

PROCESS

Listing of steps from the Performance Elements which must be performed or the required order or performance for meeting the standard.

OCCUPATIONAL EARNINGS AND EMPLOYMENT INFORMATION MEETING PROFESSIONAL CLUSTER

I. Developmental Process and Occupational Definition

A. Developmental Process

After reviewing the current labor market information, the Hospitality Subcouncil recommended the development of skill standards for meeting professionals. The identified careers meet the criteria established by the Illinois Occupational Skill Standards and Credentialing Council (IOSSCC) for performance skill standard development, education and training requirements, employment opportunities, earnings potential and career opportunities. A product developer knowledgeable about meeting planning began the process of performance skill identification. The product developer prepared an outline and framework designed to address the major skills expected in the workplace. The framework addresses skill requirements common to the meeting professional industry.

The subcouncil recommended the final skill standards product be presented to the IOSSCC. The IOSSCC reviewed the skill standards and met with the product developer state liaison and chair of the subcouncil. Based on the review, the IOSSCC voted to endorse the meeting professional skill standards.

1. Resources

Common and accepted references provided reinforcement for the direction given in the framework. Those references included current texts used by educational institutions and guidelines set by the Convention Industry Council (CIC) and Professional Convention Management Association (PCMA).

2. Standards Development Committee

A Standards Development Committee (SDC) composed of meeting professionals was convened. The framework, initial outline, matrix and draft skill standards were presented to the SDC for review, revision, adjustment and validation. Educators reviewed the standards for consistency in terminology and the assessment criteria.

B. Occupational Definitions

All meeting planners are required to have extensive organizational and interpersonal skills as well as the ability to be flexible where changes or unexpected circumstances arise. Major responsibilities also include researching, budgeting, staffing and collecting data on meeting results and customer satisfaction. Occupational titles and job responsibilities for meeting planners vary depending on the size and scope of the operations of the employing entity.

1. **Convention Services Associate/Assistant** plan a large quantity of meetings annually for groups that usually have fewer than 50 attendees. They are responsible for making sure food service, room setup, equipment and guestrooms, etc. meet the expectations of the customer. They are supervised by a convention services manager.

2. **Meeting Planner/Coordinator** plan large scale meetings which may require a minimum of six months' lead-time. It is common for the meeting to be so large that several meeting planners/coordinators will work together to plan different components of the same meeting. Other related occupational titles may include Exhibit Manager, Destination Manager or Special Events Manager. In many cases the meeting planner will perform these skills, but in many cases they are vocations unto themselves. The meeting planner/coordinator can work in any number of areas including associations, corporations or independent meeting planning companies.
3. **Convention Services Manager** are responsible for all types of functions including larger meetings and events held in their facility, and some can take up to a year or more to plan depending on the complexity of the event. Major duties of a convention services manager include budgeting, contracting, staffing and scheduling. They supervise associate planners and ensure the customers are pleased with the services offered by the facility and may work in a variety of facilities including hotels and convention centers.
4. **Director/Manager of Meetings** work with planning committees, entertainers, exhibitors, convention services managers and many outside service contractors/vendors. The director/manager of meetings is responsible for doing extensive research to ensure he/she has provided the customer with the best possible meeting location and facility within the budget allowed. This may be done a year or more in advance of many meetings. He/she will also oversee a large staff and must often hire additional support staff for larger events. They typically work for an association, corporation, convention center or independent meeting planning company.

II. Employment and Earnings Opportunities

A. Education and Training Requirements

Meeting professional occupations are emerging as full-time occupations rather than components of other jobs. The education and training requirements are therefore in flux. The larger the employing entity and scope of the event, the more critical it is for the meeting professional to possess specific education and experience related to meeting planning. Most major associations, hotels and convention centers employ personnel who have a baccalaureate degree and related experience.

B. Employment Opportunities

Employment opportunities in all facets of this industry should grow at or above the average in both the state and the nation through 2008. Most opportunities in occupations in this industry will be concentrated in metropolitan areas or tourist locations with substantial facilities.

According to Meetings and Conventions' 2000 Meetings Market Report, the top states for corporate meetings in 1999, and the percentage of planners who held meetings there were: California, 37 percent; Florida, 31 percent; Illinois, 27 percent, Nevada, 21 percent; and Texas 20 percent. According to the Illinois Department of Commerce and Community Affairs, major statewide efforts are underway to attract more meetings and conventions.

Sources: *Occupational Outlook Handbook (OOH)*, U.S. Dept. of Labor, Bureau of Labor Statistics; Convention Industry Council; Meeting Professionals International; and Professional Convention Management Association.

C. Earnings Opportunities

	Average Annual Earnings 2000
Convention Services Associate/Assistant	$30,575
Meeting Planner/Coordinator	$37,480
Convention Services Manager	$49,075
Director/Manager of Meetings	$62,450

Sources: Annual Compensation Survey, Professional Convention Management Association, 2000 Occupational Employment Statistics: Wage Data and Occupational Projections 2008, Illinois Department of Employment Security, Economic Information and Analysis Division; Horizons, Career Information System.

III. Assessment and Credentialing Systems

The IOSSCC recognizes that industry commitment for third party assessment is beneficial and requests that each SDC and/or subcouncil identify the most beneficial method for assessing the standards.

The most commonly sought after designation is the Certified Meeting Professional (CMP) which is administered by the Convention Industry Council (CIC). Individuals interested in the CMP program can access a preparation course from the Professional Convention Management Association (PMCA). Other certification and credentialing can be obtained through various industry associations.

IV. Industry Support and Commitment

The primary areas currently identified for industry support and commitment of occupational skill standards are development, updating and marketing. Business and industry partners may identify future uses of occupational skill standards such as credentialing/certification, career development of employees and specifications for out-source training programs.

A. Industry Commitment for Development and Updating

1. The development of skill standards for meeting professionals is the effort of the Hospitality Subcouncil and the SDC. Names of persons serving on the subcouncil and SDC are located in the appendices.
2. In developing the products, the following steps were completed:
    a. Identification and prioritization of career ladder, identifying jobs by name
    b. Review of resources
    c. Development of draft matrix of performance standards
    d. Development of performance standard that was identified on matrix
    e. Convening SDC of incumbent workers
    f. Review, validation and approval of skill standards by SDC
    g. Review and approval of standards by subcouncil
    h. Endorsement of skill standards by IOSSCC

B. Industry Commitment for Marketing

The Hospitality Subcouncil is committed to marketing and obtaining support and endorsement from the leading industry associations impacted by the skill standards. Upon recognition/endorsement of the standards by the IOSSCC, the subcouncil strongly recommends that professional trade groups, academic groups, etc. develop and provide an in-service/seminar package to promote skill standard awareness and to obtain full industry support and commitment for the development of a full industry marketing plan.

The Hospitality Subcouncil encourages the availability of skill standards to the public including learners, parents, workers, educators at all levels, employers and industry personnel.

ASSUMPTIONS FOR MEETING PROFESSIONAL CLUSTER SKILL STANDARDS

Skill standards assume that individuals have received education and/or training in a setting such as a secondary, post-secondary and/or apprenticeship/on-the-job training program and have the background knowledge necessary for performing the skill standards contained in this publication. The education and/or training includes instructions, including the purpose of use, when to use, how to use and any related safety issues, for the proper handling and operation of materials, tools and equipment required for performing the skills. The training program must adhere to all local, state and federal licensing and/or certification requirements as set by law, if applicable.

The Standards Development Committee developed these skill standards based on the following assumptions:

1. Workplace skills (employability skills) are expected of the individual. Socialization skills needed for work are related to lifelong career experience and are not solely a part of the initial schooling process. These are not included with this set of statements.
2. Specific policies and procedures of the work site will be made known to the individual and will be followed.
3. Time elements outlined for the skill standards result from the experience and consideration of the panel of experts who made up the SDC.
4. Skills will progress from simple to complex. Once a skill has been successfully completed, it will be incorporated into more complex skills.
5. Skill standards describe the skill only and do not detail the background knowledge or theory related to the particular skill base. Although the skill standard enumerates steps to successful demonstration, rote approaches to the outcomes are not prescribed.
6. Skills will be completed in an expedient and safe manner.
7. Skill standards are selected because they meet workplace needs and are designed to meet professional standards of practice.
8. Skill standards do not replace, supersede or substitute for procedure manuals.
9. Skill standards do not supersede or take the place of industry certification or graduation from an accredited program of study.
10. One hundred percent accuracy includes the self correction of errors.
11. The order and method in which skills are performed can vary depending on meeting objectives.
12. Skill standard performance will be modified depending upon input and changes from committee work and/or input and changes from higher authority decision makers.
13. Skill standards are not listed in sequential order; many skills are performed simultaneously.
14. The size of the meeting facility, their scope of services, and the type of venue all determine the approach to meeting the skill standard.
15. Meeting planners/coordinators are expected to respond positively to the needs and/or requests of a diverse (i.e., cultural, social, physical) clientele.
16. Meeting planners/coordinators are expected to demonstrate flexibility and adaptability in dealing with circumstances as they arise.
17. Meeting attendees' satisfaction, including issues related to safety and security, is a primary goal for all planners.

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PERFORMANCE SKILL LEVELS

	Convention Services Associate/Assistant	Meeting Planner/Coordinator	Convention Services Manager	Director/Manager of Meetings
PROGRAM PLANNING				
Set Meeting Objectives and Timeline		•		•
Identify Needs and Interests	•	•	•	•
Develop Continuing Education Component		•		•
Develop Program and Secure Speakers/Presenters		•		•
Develop Social and Entertainment Opportunities		•		•
MEETING EVALUATION AND REPORTING				
Develop Systematic Evaluation Process		•		•
Prepare Final Post-Convention Report	•	•	•	•
FINANCIAL MANAGEMENT				
Develop Income/Expense Budget		•		•
Determine Staffing		•		•
Identify Accounting Procedures and Timetables for Payment	•	•	•	•
Execute Contracts		•		•
Determine Gratuities		•		•
SITE AND FACILITY SELECTION				
Create Request for Proposal (RFP)		•		•
Determine Possible Sites		•		•
Conduct Site Inspections		•		•
Research Potential Facilities' Meeting Board		•		•
Evaluate Site's Ability to Provide Security		•		•
Negotiate Rates		•		•
Make Tentative Booking		•		•
Finalize Facility Contract		•		•
HOUSING AND RESERVATIONS				
Determine Reservation Method and Guidelines	•	•	•	•
Prepare Rooming List		•		•
TRANSPORTATION				
Arrange Travel Assistance	•	•	•	•
Negotiate and Arrange Air Transportation		•		•
Select Ground Operator and Complete Ground Transportation Arrangements	•	•	•	•

PERFORMANCE SKILL LEVELS

	Convention Services Associate Assistant	Meeting Planner Coordinator	Convention Services Manager	Director/Manager of Meetings
REGISTRATION AND INFORMATION SYSTEMS				
Determine Registration Procedures		•		•
Prepare and Order Registration Forms		•		•
Select and Order Badges		•		•
Select, Order and Prepare Registration Packets		•		•
Develop Procedures for Publishing Registration List		•		•
Plan and Set Up Registration Area	•	•	•	•
Plan and Implement On-Site Registration Procedures		•		•
SHIPPING PROCEDURES				
Select Shipping Method and Carrier		•		•
Create and Complete Control Sheet	•	•	•	•
Complete Shipping Information Agreement		•		•
Instruct Staff on Shipping Procedures	•	•	•	•
Insure Shipments		•		•
MEETING AND FUNCTION ROOMS				
Create Final Program		•		•
Choose Setup for Each Function		•		•
Identify and Arrange for Equipment	•	•	•	•
Negotiate and Control Function Room Charges	•	•	•	•
EXHIBITS				
Inspect Exhibition Area	•			•
Select Service Contractors/Vendors	•	•	•	•
Determine Exhibit Costs		•		
Determine Signage and Booth Decorations		•		
Determine Shipping Details for Exhibits		•		
Review Insurance and Liability Contracts	•	•	•	
Determine Exhibit Guidelines		•		
Create Exhibitor Service Manual		•		
Provide Pre-Function Information to Exhibitors		•		
Promote Exhibitor Participation		•		
Establish Exhibit Operation Procedures		•		

PERFORMANCE SKILL LEVELS

FOOD AND BEVERAGES	Convention Services Associate/Assistant	Meeting Planner/Coordinator	Convention Services Manager	Director/Manager of Meetings
Plan Food and Beverage Needs	•	•	•	•
Negotiate Costs		•		•
Select Rooms and Setups for Functions	•	•	•	•
Identify Pre-Event Arrangements	•	•	•	•
Identify Post-Function Tasks		•		•
AUDIO VISUALS AND TELECONFERENCING				
Determine Role and Objective of Audiovisuals		•		•
Determine Equipment/Material Needs for Speakers		•		•
Schedule Meeting Rooms	•	•	•	•
Complete All Arrangements With On-Site Coordinator		•		•
PROMOTION AND PUBLICITY				
Identify Attendee Promotional Strategies		•		•
Secure Sponsorship/Fund-Raisers		•		•
Implement Promotional Plan		•		•
Prepare Promotional Materials and Press Releases		•		•
Set Up Pressroom	•	•	•	•
Prepare Printed Materials		•		•
PRE-CONVENTION BRIEFINGS				
Set Up Schedule for Briefings	•	•	•	•
Conduct Briefing Meetings	•	•	•	•

SET MEETING OBJECTIVES AND TIMELINE.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Mission statement of meeting
Outline of knowledge/topics to be shared
Meeting time schedule
Statement of minimum number of attendees and/or exhibits required to support program objectives
Records and documentation from previous meetings (multi-year [five preferred])
Post-convention report form from previous meeting
Listing of number and type of rooms blocked and picked up
Documents showing arrival and departure patterns
Data on servicing requirements
Documentation of past promotional assistance provided by hotel, bureau, etc.
Documentation of expenses from previous similar meeting
Evaluation summary of previous meeting
List of factors that could significantly affect conditions (e.g., economic or industrial developments, etc.)
Computer/printer/manuals

WORK TO BE PERFORMED

Set meeting objectives and timeline.

PERFORMANCE CRITERIA

All meeting objectives are specific and measurable.

Skill is performed with 95% accuracy.

Time required to complete the skill varies depending on size and history of event but must be completed prior to all other planning.

PERFORMANCE ELEMENTS

1. Conduct needs analysis.
   a. Collect information from similar events if first time meeting and locate all information available from previous meetings.
   b. Collect demographic and other critical information on past and prospective attendees.
   c. Review post-convention report form.
   d. Read evaluation of previous meeting.
   e. Determine if attendance is mandatory or voluntary.
   f. Consider who pays.
   g. Determine if continuing education is a requirement.
   h. Consider importance of networking opportunities.

2. Determine direction, reason, purpose and expected outcome of meeting.
3. Write measurable objectives, both SMART (Specific, Measurable, Achievable, Relevant, Time-based) objectives and PLAN (Possible, Listed in writing, Assessable, Numerical) objectives.
4. Establish timelines for meeting.
5. Work with content (e.g., education, programming, etc.) committee.
6. Determine program outline (move in through move out).
    a. General and breakout sessions
    b. Ancillary meeting functions
    c. Meeting operational space (e.g., registration space, offices, storage, etc.)
    d. Food and beverage functions
    e. Social/guest functions

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Timeline is established and meeting objectives are written.

PROCESS

All performance elements for setting meeting objectives and timeline are critical. Performance elements are numbered to show the recommended sequence for best practice; however, a different sequence may be used.

IDENTIFY NEEDS AND INTERESTS OF AUDIENCE.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Profile sheet of prospective audience
Survey questionnaire
Workbooks and agendas from previous meeting
Evaluation summary of previous meeting
Computer/printer/manuals

WORK TO BE PERFORMED

Identify needs and interests of audience.

PERFORMANCE CRITERIA

Participants' needs and interests are researched to identify possible program topics.

Skill is performed with 98% accuracy.

Time required to complete the skill varies depending on information to be collected and method used for gathering information.

PERFORMANCE ELEMENTS

NOTE: Use one or more of the following methods (steps 1-4) for gathering information about needs and interests of prospective attendees.

1. Conduct focus group interviews of 10 to 12 randomly selected people who are representative of prospective audience.
   a. Obtain professional facilitator or conduct focus group yourself.
   b. Conduct sessions that are either active and targeted or passive and broad sessions.
   c. Elicit observations, concerns and needs about field in general.
2. Utilize survey questionnaires as medium for measuring audience interests (e.g., direct mail, e-mail, Internet, etc.).
   a. Review comments from last meeting.
   b. Send out questionnaire through direct mail or Internet (e.g., ask why person attended or did not attend last meeting, do they plan to attend next meeting, what do they expect to gain from attendance, were expectations met at last meeting, etc.).
   c. Inquire about general session speakers for content and appropriateness of message; review seminars, workshops and tutorials for subject and interest. Ask attendees for suggestions.
   d. Evaluate promotion (e.g., was it timely, complete, did it provide ease of registration, etc.).

   e. Evaluate staff (e.g., were they knowledgeable, courteous, etc.).
   f. Ask about hotel accommodations, exhibit hall facilities and meeting rooms (e.g., inquire about food service, local transportation, etc.).

3. Utilize sampling technique to determine priority issues and concerns.
   a. Pretest small percentage of prospective audience using sample of sufficient size to be large enough and diverse enough to be truly representative.
   b. Utilize questions similar to those used in survey questionnaire.
4. Work with content (e.g., education, programming, etc.) committee which is a diversified group representing a cross-section of participant interests.
   a. Provide committee members with workbooks containing relevant background information (e.g. addresses, telephone numbers, email, etc.) of other committee members and minutes of past meetings.
   b. Provide planning committee detailed agendas of each meeting, outlining clearly defined deadlines and budget constraints including objectives.
5. Evaluate results of information collected to identify list of possible program topics, speakers, activities, functions and projected attendance, etc.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Needs and interests of prospective attendees are identified and defined as possible program topics.

PROCESS

All performance elements for identifying needs and interests of audience are critical and must be performed in sequence according to method used.

DEVELOP CONTINUING EDUCATION COMPONENT.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Attendees' professional guidelines
Needs assessment data
Approval from an accredited organization
Computer/printer/manuals

WORK TO BE PERFORMED

Develop continuing education component.

PERFORMANCE CRITERIA

Continuing education components are developed to incorporate all organizational requirements and attendees' professional guidelines.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on meeting objectives and complexity of accreditation process.

PERFORMANCE ELEMENTS

1. Review attendees' professional guidelines to gain accreditation of continuing education programs.
2. Review needs assessment of meeting participants (e.g., meeting evaluations, committee input, association needs survey, etc.).
3. Make appropriate topic selection and speaker(s) recommendations.
4. Develop continuing education learning objectives (e.g., through speakers, committee, course director, etc.).
5. Develop a credit reporting process (e.g., tracking, certificate issuance, maintenance, etc.) based on attendees' professional guidelines.
6. Develop or implement evaluation tool.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Continuing education component is developed and incorporated into program.

PROCESS

All performance elements for developing continuing education component are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

DEVELOP PROGRAM AND SECURE SPEAKERS/PRESENTERS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Meeting agenda
Statement of meeting objectives
Participant profile data
Evaluation summary of previous meetings
Program budget
Computer/printer/manuals

WORK TO BE PERFORMED

Develop program and secure speakers/presenters.

PERFORMANCE CRITERIA

Program is developed and speakers/presenters secured according to meeting objectives.

Time required to complete the skill varies depending on meeting objectives.

PERFORMANCE ELEMENTS

1. Design overall meeting format that will meet objectives/agenda set for meeting.
2. Plan sessions that meet the mission and learning objectives of meeting.
3. Arrange breakout or tutorial sessions that permit as much audience participation as possible.
4. Determine exhibit hours.
5. Determine appropriate presentation formats (e.g., buzz group, colloquium, debate, etc.).
6. Identify possible presenters from suggestions of members/participants, Trade Show Bureau, the International Platform Association and regional speakers' bureaus.
7. Select speakers, panelists and other participants to deliver education objectives of meeting.
8. Verify credentials of speakers.
9. Determine cost of presenters including speaker's fee and travel expenses, room and meals, if required.
10. Invite speakers and/or facilitators and confirm arrangements in writing, specifying fees, reimbursable expenses, date, time and place of presentation.
11. Design acknowledgment form for speaker to sign and return. Provide space on acknowledgment form for speaker to note audiovisual needs, if agreeable to having meeting taped, and airport pickup and return information.

12. Secure speaker's written agreement before booking, indicating that he/she will send outline of presentation 90 to 120 days in advance of meeting. Include cancellation clause and contingency for cancellation of speaker.
13. Plan some program options that include opportunities offered by location of meeting.
    a. Check with local convention bureau or local destination management company for suggestions on scenic, unusual and intellectually stimulating experiences.
    b. Select options according to participant profile.
    c. Check on special events that might conflict.
14. Plan variety of session topics with time frames and activity levels compatible with participant profile. Allow adequate time between functions.
15. Allow family time in schedule if participants are bringing spouses and children to meeting.
16. Provide children's programs by age group: four to six years old: 7-12 years old and teens. Children younger than four years will need a daycare setting.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Program format is established and speakers/presenters secured.

PROCESS

All performance elements for developing program and securing speakers/presenters are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

DEVELOP SOCIAL AND ENTERTAINMENT OPPORTUNITIES.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Participant profile data
Evaluation summary of previous meetings
Program format outline
Program budget
Computer/printer/manuals

WORK TO BE PERFORMED

Develop social and entertainment opportunities.

PERFORMANCE CRITERIA

Social/entertainment opportunities are developed that appeal to participants and fit within meeting budget guidelines.

Skill is performed with 95% accuracy.

Time required to compete the skill varies depending on type of entertainment being secured.

PERFORMANCE ELEMENTS

1. Review participant profiles, evaluations of previous meetings and budget for social and entertainment opportunities.
2. Determine projected attendance for all activities.
3. Talk to some participants to get perception of what type of social/networking activity and/or entertainment would be preferred.
4. Check with any members who may have contacts in entertainment field and who may be able to arrange performances at reduced costs.
5. Consider possibility of sponsorship by an industry supplier, etc. who might be interested in underwriting social/entertainment opportunities in return for high-visibility acknowledgment in program, on stage or both.
6. Investigate possible tie-in with charity events.
7. Review entertainment contracts for liabilities with attorney.
8. Verify contracts comply with union regulations.
9. Consider advantages of location and incorporate into program if possible (e.g., luau in Hawaii, beach party in California, etc.)
10. Consider using third-party agent and stipulate in contract that he/she will be on site. Provide agent complete details on facility where performance will take place.
11. Preview social/entertainment possibilities either in person or by video tape if third-party agent isn't used. Verify references.

12. Select social and entertainment opportunities and make certain cost is within budget, including any setup charges.
13. Set guidelines based on demographics of audience (e.g., nonsmoking, nondrinking, food preferences, etc.).
14. Prepare complete list of equipment needs, timelines and special considerations (e.g., microphones, lights, staging, power feeds, computer links, etc.).

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Social and entertainment opportunities are contracted for meeting.

PROCESS

All performance elements for developing social and entertainment opportunities are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

DEVELOP SYSTEMATIC EVALUATION PROCESS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Meeting program
Sample evaluation form
Computer/printer/manuals

WORK TO BE PERFORMED

Develop systematic evaluation process for meeting.

PERFORMANCE CRITERIA

Systematic evaluation process provides complete meeting record.

Evaluations are made on an ongoing basis.

Time required to complete process is one to two days.

PERFORMANCE ELEMENTS

1. Decide which of the following aspects of meeting will be evaluated by meeting professionals:
   a. Meeting site
   b. Meeting facilities
   c. Exhibit program
   d. Entertainment
   e. Food and beverage events
   f. Vendors
   g. Attendee turnout
   h. Convention service department
   i. House staff (e.g., nonconvention services, etc.)
2. Determine which of the following areas attendees will critique on evaluation forms:
   a. Education sessions and speakers
   b. Registration procedures and costs
   c. Meeting publicity
   d. Meeting facilities and site
   e. Entertainment and tours
   f. Program
   g. Guest programs
   h. Housing
   i. Official airline

   j. Local transportation
   k. Outside vendors
   l. Official travel agent
   m. Suggestions for future meetings
3. Determine which of the following statistical information will be collected:
   a. Type and number of sleeping rooms picked up
   b. No-show percentage
   c. Cancellation percentage
   d. Arrival and departure patterns
   e. Volume of room service and hotel restaurant usage
   f. Guarantees
   g. Exhibit sales
   h. Budget analysis
   i. Registrant profile
   j. Special event attendance
   k. Session attendance
4. Determine which of the following formats will be used for attendee evaluation forms:
   a. Session-specific forms
   b. On-site survey questionnaires (computerized or with computer terminal)
   c. Survey questionnaires sent by mail
5. Design evaluation form considering the following:
   a. What are objectives of collecting data?
   b. Should specialists be consulted?
   c. Will forms be used again?
   d. Is there a range of responses to questions?
   e. How will results be tabulated?
   f. How will results be collected?
   g. What is the budget for evaluation forms?
   h. To whom will information be distributed?
6. Arrange wrap-up meeting with the following:
   a. Hotel and convention center officials
   b. Convention bureau
   c. Vendors
   d. Staff
   e. Planning committee

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

A systematic evaluation process and evaluation form(s) are developed.

PROCESS

All performance elements for developing a systematic evaluation process are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

PREPARE FINAL POST-CONVENTION REPORT.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Records of meeting
Attendance information sheet
Housing data
List of service contractors/vendors
Programs information sheet
Exhibits data
List of locations
Meeting evaluation forms
Other evaluation information materials
Americans with Disabilities Act (ADA) requirements

WORK TO BE PERFORMED

Prepare final post-convention report.

PERFORMANCE CRITERIA

Final post-convention report provides detailed information to be used for planning future meetings.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on size of meeting.

PERFORMANCE ELEMENTS

General

1. Collect all appropriate documentation (e.g., account details, evaluations, etc.).
2. Identify account information including:
    a. Organization name, division, meeting dates, contact, title, and address, phone number, fax number and e-mail address.
    b. Facility name, sales manager, convention sales manager and catering manager.
    c. Intermediaries including contact name, title, address, phone number, fax number and e-mail address.
3. Provide information on commissions paid and to whom.
4. List attendance information (e.g., members, spouses, speakers/guests, exhibitors, exhibit attendees, etc.).
5. Provide information on food and beverage consumption using various reports (e.g., banquet charges, catering charges, restaurant reports, etc.).
6. Include meeting information such as date of final agenda/program received, largest single meeting (number of people) and largest number of concurrent meetings.
7. List number of meeting rooms with 24-hour hold.

8. Identify concurrent meeting breakdown including day, date and room setup.
9. Attach copy of facility's final resume.
10. List any special ADA requirements.
11. Complete post-convention report stating that information is accurate and complete and provide a signature, name, title and date of report.
12. Include summary of any overall comments.

Housing

13. List headquarters hotel and other hotels accommodating attendees.
14. Check group rates and availability after cutoff date.
15. Identify overflow hotel(s) by name.
16. Include information from room pickup report.

Vendor

17. List outside vendors including information about revenue and performance.

Program

18. Identify recreation/activities and describe type and numbers of participants.

Exhibit

19. List all exhibitors and type of booth for each.
20. Collect information from exhibitors as to how they would rate the show and what could be done to improve their exhibit experience.

Location

21. Identify advantages and disadvantages of meeting location (e.g., easy access to transportation, centrally located, lack of recreational and area opportunities, inclement climate and weather, etc.)

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Final post-convention report detailing information for planning of future meetings is completed.

PROCESS

All performance elements for preparing a final post-convention report are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

DEVELOP INCOME/EXPENSE BUDGET.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Budget history data of previous meeting
Statement of meeting objectives
Statement of budget policies

WORK TO BE PERFORMED

Develop income/expense budget for meeting.

PERFORMANCE CRITERIA

Income and expense budget is determined for meeting following meeting objectives and budget policies.

Skill is performed within financial parameters.

Time required to complete the skill is two to three days.

PERFORMANCE ELEMENTS

1. Review budget history of previous meetings.
2. Review meeting objectives and budget policies.
3. Identify fixed and variable expenses.
4. Establish income parameters to include:
    a. Registration
    b. Exhibit space rental
    c. Social functions
    d. Investment income
    e. Sponsorship
    f. Advertising
    g. Rebates
5. Determine income and expenses.
6. Apply financial goals to budget as to break-even, profit and loss.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Income/expense budget is developed.

PROCESS

All performance elements for developing income/expense budget are critical. Performance elements are numbered to show an appropriate sequence for completing the skill: however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Previous meeting history data
Statement of meeting objectives and budget policies
Meeting program
Staff evaluation forms

WORK TO BE PERFORMED

Determine staffing needs for meeting.

PERFORMANCE CRITERIA

Staffing needs are established according to meeting objectives and budget policies.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on size of meeting to be staffed.

PERFORMANCE ELEMENTS

1. Review previous meeting history regarding staffing.
2. Review meeting objectives and budget policies.
3. Identify when and where staffing will be needed.
4. Identify which tasks can be done by volunteers and which tasks require paid staff.
5. Determine how many additional paid staff will be needed.
6. Assign staff to tasks for pre meeting, ongoing and post meeting activities.
7. Hire additional staff if needed.
8. Communicate to staff specific tasks they are assigned to do.
9. Monitor staffing effectiveness throughout meeting.
10. Evaluate staffing and include results in post meeting report.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Staffing needs are determined to meet all tasks and assigned duties.

PROCESS

All performance elements for determining staffing needs are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

IDENTIFY ACCOUNTING PROCEDURES AND TIMETABLES FOR PAYMENT.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Facility's resume or event order form
List of organization's accounting requirements
Copy of all contracts
Statement of meeting objectives and budget policies

WORK TO BE PERFORMED

Identify accounting procedures and timetables for payment.

PERFORMANCE CRITERIA

Accounting procedures are identified and timetables for receipts and payments are established according to budget guidelines.

Skill is performed with 100% accuracy.

Time required to complete the skill is one day.

PERFORMANCE ELEMENTS

1. Review organization's accounting procedures.
2. Send facility detailed instructions on master account billing procedures, including:
   a. Charges that should be posted to account
   b. Persons authorized to sign for expenses
   c. Specimen signatures
   d. Limits of organization's financial responsibility
   e. Master account authorization form
   f. Charges that should be posted on attendee accounts
   g. Dates for payment
3. Complete the following at least six months prior to meeting:
   a. Review past billing procedures.
   b. Request resume form from all vendors.
   c. Clarify billing policies and payment dates.
   d. Determine types of accounts to be set up.
4. Review billing procedures with vendor representative at least one month before meeting to check the following:
   a. Billing instructions are distributed to appropriate facility personnel.
   b. Arrangements are in order for periodic review of daily billing statements during meeting.
   c. Signed detailed backup for charges to billing statements are attached to statements.

5. Finalize accounts before leaving facility at end of meeting making certain to complete the following:
   a. Approve correct charges on master account.
   b. Identify disputed and delayed charges.
   c. Attempt to resolve any disputed charges.
   d. Reconfirm dates for payment.
6. Receive complete and final bill and take appropriate action.
   a. Check accuracy.
   b. Compare against organization's signed billing statements.
   c. Make payments.
   d. Prepare post-conference report and compare to budget.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Accounting procedures are communicated to facility's accounting representative and payment timetables are established.

PROCESS

All performance elements for identifying accounting procedures and timetables are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Statement of organization's goals and policies
Contracts
Organization's insurance policies

WORK TO BE PERFORMED

Execute contracts after approval from legal and insurance representation.

PERFORMANCE CRITERIA

Meeting contracts and insurance policies meet approval from legal and insurance representatives.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on complexity of meeting contracts and legal and/or insurance agency recommendations.

PERFORMANCE ELEMENTS

1. Obtain legal advice before signing any agreements.
2. Review space contract for the following:
   a. Identification of group and hotel.
   b. Sleeping room reservation (e.g., number and type of rooms, reservation details, cut-off dates, etc.).
   c. Billing procedures (e.g., method and time of payment, people authorized to sign, etc.)
   d. Meeting and exhibit room rentals and set up charges.
   e. Convention services, (e.g., equipment, union jurisdiction and arrangements.)
   f. Food and beverage, (e.g., number, type, attendance, confirmation dates, guarantee dates, etc.)
   g. Exhibit booth requirements, (e.g., storage, setup, dismantling, security, etc.)
   h. Transportation and parking gratuities
   i. Promotional support
   j. Protection clauses (e.g., fire protection, cancellation, arbitration, etc.)
3. Review the insurance package for the following:
   a. General liability – bodily injury and property damage
   b. Fire legal liability
   c. Broad form property damage
   d. Medical payment
   e. Incidental medical malpractice
   f. Certificate of insurance from contractors
   g. Independent contractors' liability
   h. Products liability

   i. Host liability/liquor liability
   j. Organization as additional insured for charter transportation
   k. Valuable records and papers insurance
   l. Office contents coverage
   m. Burglary and robbery.
   n. Worker's compensation
   o. Travel accidental death and dismemberment
3. Ensure that contracts are reviewed and signed by authorized personnel.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Contracts and insurance policies are reviewed with legal assistance and/or insurance agent prior to signing.

PROCESS

All performance elements for reviewing and maintaining contracts and insurance policies are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

DETERMINE GRATUITIES.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Past history data
Meeting program
Program budget
Service contractor/vendor guidelines
Convention and Visitors Bureau (CVB) guidelines

WORK TO BE PERFORMED

Determine gratuities to be included in program budget.

PERFORMANCE CRITERIA

Gratuities determined for program budget closely match actual amount of gratuities paid at conclusion of meeting.

Skill is performed with 98% accuracy.

Time required to complete the skill is two to three hours.

PERFORMANCE ELEMENTS

1. Review program for meeting and identify which events and services (e.g., facility executives, tourist board, other planners, unions, convention bureau, etc.) should receive a gratuity.
2. Identify if gratuity budget will be based on
   a. Percentage of total master account.
   b. Set amount per attendee or
   c. Arbitrary amount not related to total bill.
3. Determine form of gratuities.
4. Consider factors that influence amounts and specific gratuities.
5. Decide methods of distribution.
6. Establish timing of distribution immediately after event.
7. Establish records needed for proper accounting.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Gratuities are determined and included in meeting budget.

PROCESS

All performance elements for determining gratuities are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

CREATE REQUEST FOR PROPOSAL (RFP).

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

List of meeting program components
Completed pre-convention and post-convention reports
Computer/printer/manuals

WORK TO BE PERFORMED

Create request for proposal (RFP).

PERFORMANCE CRITERIA

Priority list that identifies all meeting requirements is established.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on scope of event.

PERFORMANCE ELEMENTS

1. Review meeting program components and completed pre-convention and post-convention reports.
2. Create master list of needs for upcoming meeting.
3. Establish deadline for RFP's.
4. Write RFP.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

RFP is created.

PROCESS

All performance elements for creating RFP are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

DETERMINE POSSIBLE SITES.

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SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Statement of meeting objectives
List of prioritized criteria for selection of meeting site
Request for Proposal (RFP)
Computer/printer/manuals

WORK TO BE PERFORMED

Determine possible sites to hold upcoming meeting.

PERFORMANCE CRITERIA

Possible meeting sites are determined according to meeting goals and obligations

Time required to complete the skill varies depending on number of possible sites considered.

PERFORMANCE ELEMENTS

1. Use one or more of the following to identify potential meeting site including, but not limited to:
   a. Peer review
   b. Internet
   c. Chamber of Commerce
   d. Client reference
   e. Trade journals
   f. Convention Visitors Bureau (CVB)
2. Request information about hotels and convention centers (e.g., travel accessibility, bureau services, area climate, shopping and tours availability, approximate costs and advantages of off-season meetings, etc.).
3. Check on different types of transportation availability and predominant air carrier for each potential site.
4. Review all information and determine sites that best fit established meeting criteria and needs of participants.
5. Research area for concurrent and/or conflicting events (e.g., local festivals, other conventions, road construction, anything that may affect room rates, etc.).
6. Distribute RFP.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Possible sites that meet established meeting criteria and needs of participants are selected.

PROCESS

All performance elements for determining possible sites are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Selected sites' information sheets
List of requirements for meeting
Prioritized criteria checklist
Outline of expectations of facility/location
Completed Request for Proposal(s) [RFP(s)]
Computer/printer/manuals

WORK TO BE PERFORMED

Conduct site inspections.

PERFORMANCE CRITERIA

Site inspections are conducted according to outline of expectations of facility and location.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of sites to be inspected.

PERFORMANCE ELEMENTS

1. Review completed RFP(s) and select sites to visit.
2. Determine which people are to participate in site visits and site selection, taking at least one person along who has been selected by client/committee chairperson.
3. Inform selected site of intention to visit, number visiting and dates of visit.
4. Conduct site inspections at least one year or more prior to large meeting and several months prior to smaller meeting.
5. Meet with convention services staff and any outside service contractors/vendors.
6. Schedule additional site visit(s) as near to meeting time as possible.
7. Compile detailed checklist for site inspection (e.g., ADA accessible, number and size of meeting rooms, construction/renovation plans of facility, etc.).
8. Make travel plans to visit sites.
9. Conduct site visits using checklist.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Site inspections are made to selected sites.

PROCESS

All performance elements for conducting site inspections are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

RESEARCH POTENTIAL FACILITIES' MEETING RECORD.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Official posted rack rates
List of similar meeting professionals who have used facility
Rates of comparable hotels in area
List of identified marketplace pressures that could assist in negotiations
Computer/printer/manuals

WORK TO BE PERFORMED

Research potential facilities' meeting records.

PERFORMANCE CRITERIA

Information on each potential site is evaluated and compiled.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of facilities to be researched.

PERFORMANCE ELEMENTS

1. Identify posted rack rates for facilities under consideration.
2. Collect information and rack rates, etc. from other comparable hotels in area.
3. Identify any marketplace pressures that could be an advantage/disadvantage in negotiations.
4. Identify local union or labor issues.
5. Identify any potential surcharges (e.g., resort fee, energy surcharge, etc.)
6. Contact other similar groups who have used facility and discuss their level of satisfaction, problems, etc.
7. Compile information gathered about each facility under consideration.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Potential facilities' meeting records are researched.

PROCESS

All performance elements for researching potential facilities' meeting records are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

EVALUATE SITE'S ABILITY TO PROVIDE SECURITY.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Security equipment (e.g., safety-deposit boxes, surveillance cameras, alarm systems, etc.)
Security personnel
Security checklists and written standard operating procedures
Key control policy and procedures
Loss prevention and asset protection procedures
Security log
Security signage
Property policy and procedures

WORK TO BE PERFORMED

Evaluate site's ability to provide maximum attendee and property security.

PERFORMANCE CRITERIA

Site's ability to provide maximum security for guests and attendees meets the meeting requirements.

The skill is performed without error.

All elements of site security are reviewed and verified.

PERFORMANCE ELEMENTS

1. Check the following security practices to make sure that the site can
   a. Ensure maintenance of property security equipment systems is completed according to schedule (e.g., alarms, emergency lighting, and surveillance cameras, etc.).
   b. Ensure guest security (e.g., key control, and safety-deposit box access, etc.).
   c. Protect/verify guest identity.
   d. Screen phone calls according to property policy and procedures.
   e. Set/reset alarm systems.
   f. Maintain security signage.
   g. Monitor public access areas and equipment (e.g., exhibition areas, stairways, entry/exit areas, recreational areas, etc.).
   h. Monitors access points (e.g., service entrance, utility access, etc.).
   i. Monitor parking areas.
   j. Perform asset protection.
   k. Provide personal care as needed by appropriate staff who hold licenses/certificate required by local ordinances (e.g. fire, secondary blood-born pathogens, CPR, etc.).
2. Identify specific security needs required for the meeting.

3. Identify local, national and international news/issues that may affect your event, meeting or travel.
4. Ensure that emergency plans are integrated into every event.
5. Develop contingency destinations and facilities in case venues must be changed.
6. Provide attendees with useful security, health and cultural guidelines customized to the destination, venues and activities.
7. Notify appropriate individuals of designated point of contact in case of crisis or emergency.
8. Ensure professional event security resources are well established and complete details including background checks, etc. are in place.
9. Determine if security risks and breaches reported to designated staff are acted upon promptly and courteously.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Site's ability to provide security had been evaluated and meets the requirements for the meeting.

PROCESS

All performance elements are critical for maximizing guest and property security.

NEGOTIATE RATES.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Meeting budget
Meeting room rates
Statement of complimentary room policy
Price quotes for food functions
List of in-house services
Statement of facility's meeting policies
Computer/printer/manuals

WORK TO BE PERFORMED

Negotiate best possible rates for meeting within budget guidelines.

PERFORMANCE CRITERIA

Rates are negotiated within budget guidelines.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of sites.

PERFORMANCE ELEMENTS

1. Identify most viable sites for meeting.
2. Negotiate best possible rates based on
   a. Sleeping rooms block and pattern (complimentary and attendee),
   b. Quantity of meeting room(s),
   c. Number of food and beverages functions,
   d. Hospitality and VIP suites, and
   e. Exhibit hall/space, if applicable.
3. Discuss in-house services including but not limited to the following:
   a. Equipment rentals
   b. Complementary rooms
   c. Pre-convention and post-convention room rates
   d. Photographer services
   e. Audiovisual equipment
   f. Security personnel
   g. Access to business center
   h. Accommodations for persons with disabilities
4. Review meeting and exhibit space and negotiate any related cost.
5. Negotiate extras (e.g., baggage handling, etc.).
6. Record details agreed upon during negotiations and later exchange in writing.
7. Request updated proposal.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Rate negotiations are completed with selected facility.

PROCESS

All performance elements for negotiating rates are critical. Performance elements are numbered to show an appropriate sequence for completing the sill; however, a different sequence may be used.

MAKE TENTATIVE BOOKING.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Facility's booking proposal
Letter of agreement
Statement of facility's meeting policy and procedures
Contract
Computer/printer/manuals

WORK TO BE PERFORMED

Make tentative booking.

PERFORMANCE CRITERIA

Tentative booking is made with agreement containing all contract negotiations.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on facility with which negotiations are made.

PERFORMANCE ELEMENTS

1. Review every detail included in booking proposal prepared by facility making sure it includes everything agreed upon during negotiations.
2. Check for detailed descriptions of the following:
   a. Number and type of accommodations for meeting
   b. Detailed summary (number and type) of all facility's rooms
   c. Function-area floor plans including any special charges
   d. List of technical equipment and support services that can be provided
   e. List of exclusive suppliers, if any
   f. Accurate description of relationship to be expected with convention services manager
   g. List of special features that make property unique
   h. Complete description of facility's restaurants, sports facilities, entertainment areas and shops
   i. Information about special rules or regulations regarding licenses, taxes, beverage control, union contracts, automatic charges, gratuities, etc.
3. Meet with attorney to review contract for liabilities. (See Skill Standard 11: Execute Contracts.)
4. Send facility a letter of agreement if proposal is acceptable: include initialed copy of proposal and option date mutually agreed upon indicating when tentative agreement becomes definite agreement.
5. Release in writing any tentative booking of space that will not be needed if that is known before option date.
6. Finalize contract prior to option date.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Tentative booking for meeting is completed and agreement finalized with a contract prior to option date.

PROCESS

All performance elements for making tentative booking are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

FINALIZE FACILITY CONTRACT.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Facility's authorization sheet
Contract
Statement of facility's meeting policy and procedures

WORK TO BE PERFORMED

Finalize facility contract.

PERFORMANCE CRITERIA

Facility contract is finalized according to function requirements.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on complexity of function requirements.

PERFORMANCE ELEMENTS

1. Provide site executive an authorization sheet for organization scheduling meeting. Include names (e.g., addresses, phone numbers email, etc.) and responsibilities of all people in organization.
2. Receive facility's authorization sheet.
3. Arrange meeting with convention services manager and plan in-person briefing sessions to outline specific needs by function and responsibility.
4. Confirm all details and subsequent communications in writing.
5. Set up briefings during pre-convention period and daily during meeting, and schedule a post meeting debriefing.
6. Establish procedure for receiving post meeting critique and written post meeting report from convention services manager.
7. Finalize facility contract.
8. Secure signature of authorized personnel.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Facility contract is finalized.

PROCESS

All performance elements for finalizing facility contract are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

DETERMINE RESERVATION METHOD AND GUIDELINES.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Past reservation history data
Statement of hotel reservation policies

WORK TO BE PERFORMED

Determine reservation method and guidelines.

PERFORMANCE CRITERIA

Reservation method and guidelines are determined following past reservation history and anticipated attendance.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on reservation method and guidelines to be established.

PERFORMANCE ELEMENTS

1. Determine number of people needing housing accommodations using past meeting records and anticipated attendance.
2. Determine housing agent (e.g., hotel, local convention bureau, third-party organization, in-house, etc.). Make determination based on anticipated attendance, efficiency of task and service fees charged.
3. Review hotel contract(s) and determine sub/blocks (e.g., VIP, speakers, staff, etc.), complimentary rooms and special negotiated rates.
4. Establish policies and priorities for processing reservations including assignments, deposit requirements, cutoff date and payment receipt (e.g., cash, credit card, check, purchase order, etc.).
5. Determine reservation method (e.g., phone, fax, Internet, mail, etc.).
6. Determine acknowledgement method (e.g., phone, fax, Internet, mail, etc.).
7. Establish reporting system for reservation, changes, cancellations and no-shows.
8. Monitor processing and reporting systems.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Reservation method and guidelines are determined.

PROCESS

All performance elements for establishing reservation method and registration guidelines are critical and must be performed in sequence.

PREPARE ROOMING LIST.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

List of attendees requesting accommodations
List of special attendees (e.g., speakers, exhibitors, officers, etc.) requesting accommodations
Hotel contract and statement of reservations policies
Hotel reservation form
Statement of organization's housing policies
Computer/printer/manuals

WORK TO BE PERFORMED

Prepare rooming list by matching room block to requested accommodations of meeting attendees.

PERFORMANCE CRITERIA

All attendees are accounted for on rooming list and accommodation needs are identified.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of attendees to be housed and their special needs.

PERFORMANCE ELEMENTS

1. Send reservation form or internally developed registration form to each person invited to attend meeting. Form should include reservation procedures (e.g., payment terms, room rates, deposit requirements, cutoff date, etc.). Make sure form also includes place to identify attendee's name, address, arrival/departure dates and whether special accommodations are needed, or any information needs specific to meeting.
2. Determine list format (e.g., alpha by attendee's name, arrival date, etc.).
3. Receive completed forms and send acknowledgement to each respondent upon receipt of housing request.
4. Apply negotiated terms (e.g., complimentary rooms, special rates, special billing, suites, etc.) according to organization's policy and hotel's contract with specific attendees (e.g., VIPs, staff, speaker, etc.).
5. Prepare rooming list using previously determined format and send to housing agent prior to hotel's contract cutoff date.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Rooming list is completed.

PROCESS

All performance elements for preparing rooming list are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

ARRANGE TRAVEL ASSISTANCE.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Dates of meeting
Previous travel history data
List of potential professional travel advisors
List of tours and off-site programs planned
Names and locations of hotels used for housing meeting attendees
Computer/printer/manuals

WORK TO BE PERFORMED

Arrange travel assistance for meeting attendees.

PERFORMANCE CRITERIA

Travel assistance is arranged to handle travel to and from meeting as well as ground transportation for shuttle service, tours and off-site programs.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on travel assistance arrangements needed.

PERFORMANCE ELEMENTS

1. Determine type of travel advisors (e.g., travel agents, airlines, specialized travel service, etc.) needed to assist with event.
2. Determine if client has preferred travel agent.
3. Provide travel professionals with information on attendee demographics, expected attendance, past attendance and cargo opportunities.
4. Request summary of services that professional travel advisors can provide.
5. Obtain cost analysis to determine which advisors can provide best services for meeting.
6. Select professional travel advisors with which to work.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Travel assistance is arranged.

PROCESS

All performance elements for arranging travel assistance are critical and must be performed in sequence.

NEGOTIATE AND ARRANGE AIR TRANSPORTATION.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Meeting dates
Travel records from previous meetings
Comparative airline cost analysis data
Computer/printer/manuals

WORK TO BE PERFORMED

Negotiate and arrange air transportation for meeting attendees.

PERFORMANCE CRITERIA

Air transportation that will meet needs of greatest number of attendees is arranged for meeting.

The skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of air transportation negotiations and arrangements to be made.

PERFORMANCE ELEMENTS

1. Determine air transportation needs.
2. Determine if it is possible and advantageous to appoint an official air carrier.
3. Negotiate types of airfares (e.g., group, promotional, super saver, etc.).
4. Identify services airline will provide.
    a. Complimentary staff travel
    b. Cost analysis
    c. Promotional assistance
    d. Advertising
    e. Convention reservation desk with toll-free telephone number
    f. Rent-a-car assistance
    g. Arrival/departure manifests
    h. VIP room
    i. Special baggage handling
5. Contract for air transportation service provider.
6. Publicize air travel in organization's newsletter or other publications.

PERFORMANCE ELEMENTS

PRODUCT

Airline transportation is negotiated and air travel arrangements are completed.

PROCESS

All performance elements for negotiating and arranging for air transportation are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SELECT GROUND OPERATOR AND COMPLETE GROUND TRANSPORTATION ARRANGEMENTS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

List of available ground operators
Budget for ground transportation
Previous meeting transportation records
List of ground transportation needs for meeting
VIP's flight schedules
Computer/printer/manuals

WORK TO BE PERFORMED

Select ground operator for meeting and complete ground transportation arrangements.

PERFORMANCE CRITERIA

Ground transportation needs are met and costs are within transportation budget guidelines.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on ground transportation arrangements to be made.

PERFORMANCE ELEMENTS

1. Ask convention bureau or hotel to provide a list of contacts for ground operators.
2. Research ground operators available. Check with meeting professionals who have handled similar groups as to their satisfaction with selected ground operators.
3. Select an operator based on the following criteria:
   a. Costs (including willingness to negotiate)
   b. Reputation (service and performance record)
   c. Number, condition and availability of vehicles
   d. Experience and expertise (mass moves or small groups)
   e. Special services
4. Ask questions before finalizing agreements including:
   a. Does company own and operate their own equipment or will they be subcontracting?
   b. What are minimum rental periods for vehicles?
   c. How are buses dispatched?
   d. Can buses accommodate persons with disabilities?
   e. Are buses air-conditioned?
   f. How comprehensive is bus company's insurance coverage?

5. Work out best route and schedule for charter or shuttle buses. Include pickup and drop off points, hours of operation and where information should be posted/published.
6. Arrange ground transportation for VIP's for arrival and departure times and best location to meet.
7. Finalize ground transportation arrangements.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Transportation agreement is completed with selected ground operator.

PROCESS

All performance elements for selecting ground operator are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

DETERMINE REGISTRATION PROCEDURES.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

History data of registration procedures of previous meetings
List of attendee categories (e.g., general attendees, VIPs, staff, etc.)
List of suppliers that provide registration services/equipment
Computer/printer/manuals

WORK TO BE PERFORMED

Determine registration procedures that are fast, simple and collect needed information.

PERFORMANCE CRITERIA

Registration procedures to meet organization objectives are determined.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on registration procedures.

PERFORMANCE ELEMENTS

1. Determine registration objectives for organization (e.g., efficient information collection, obtain early revenue stream, refine anticipated event need, etc.).
2. Determine registration categories (e.g., member vs. nonmember, exhibitors, press, guests, etc.).
3. Determine number of attendees to be registered as well as projected category activity.
4. Determine registration methods (e.g., phone, fax, Internet, mail, advance/on-site, etc.).
5. Determine information to be collected (e.g., attendee information, member data, payment terms, special accommodations, etc.).
6. Determine use of specific registration procedures (e.g., advance, on-site registration, exhibitors, etc.).
7. Establish system for receiving registrations and payment (e.g., fax, phone inquiries, etc.).
8. Establish acknowledgement procedures (e.g., phone, fax, Internet, mail, etc.).
9. Develop registration system for tabulating daily attendance figures and counts for social functions, events requiring guarantee, activity subject to fixed participation, etc.
10. Determine equipment and services required for advance processing based on projected number of advance attendees and complexity of information processed as well as equipment and support services.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Registration forms are prepared and ordered.

PROCESS

All performance elements for setting up registration procedures are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

PREPARE AND ORDER REGISTRATION FORMS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Registration forms used at previous meetings
List of suppliers that provide forms
Computer/printer/manuals

WORK TO BE PERFORMED

Prepare and order registration forms to be used for meeting.

PERFORMANCE CRITERIA

Registration forms meet all requirements of organization.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of registrants and scope of information.

PERFORMANCE ELEMENTS

1. Review registration forms used at previous meetings.
2. Determine if additional information is needed on forms based on anticipated meeting plans.
3. Determine form type (e.g., advance vs. on-site, single vs. multi copy, color-coded, etc.).
4. Design registration form to obtain maximum amount of information in minimum amount of time (e.g., logical in format, easy to read, simple to complete, etc.).
5. Determine order parameters (e.g., quantity of form types, delivery schedule, etc.)
6. Determine supplier based on cost and fulfillment requirements.
7. Order registration forms.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Registration forms are prepared and ordered.

PROCESS

All performance elements for preparing and ordering registration forms are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SELECT AND ORDER BADGES.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Badge format data from previous meetings
List of suppliers that provide badges
Computer/printer/manuals

WORK TO BE PERFORMED

Select and order badges for meeting.

PERFORMANCE CRITERIA

Badges are selected and ordered from list of suppliers.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of registrants and scope of information.

PERFORMANCE ELEMENTS

1. Review badge format used at past meetings.
2. Determine any changes in badge format based on registration categories.
3. Determine badge type (e.g., plastic, paper, embossed, adhesive, clip-on, pin-on, etc.).
4. Determine how badges will be printed (e.g., computer generated, handwritten, typed, etc.)
5. Decide information badge will contain.
   a. Preprinted information (e.g., organization name, logo, event, name, registration classification, etc.)
   b. Registrant information (e.g., name, nickname, company, location, other, etc.)
6. Determine order parameters (e.g. print specifications, quantity, size, color, coding, delivery schedule, etc.).
7. Determine supplier based on cost and requirement fulfillment.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Badges for meeting are selected and ordered

PROCESS

All performance elements for selecting and ordering badges are critical. Performance elements are numbered to show an appropriate sequence for completing the skill and must be performed in sequence.

SELECT, ORDER AND PREPARE REGISTRATION PACKETS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Number of anticipated attendees
Items to be placed in packet
List of suppliers that provide packets
Computer/printer/manuals

WORK TO BE PERFORMED

Select, order and prepare registration packets.

PERFORMANCE CRITERIA

Registration packets for attendees contain all necessary items for event.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of attendees and items to be placed in packets.

PERFORMANCE ELEMENTS

1. Determine what type of registration packet will be used (e.g., cloth, plastic bag, folder, etc.).
2. Determine if organization or event customization is needed.
3. Identify items to be included in registration packet (e.g., program, schedule changes, tickets, registration list, gifts, etc
4. Determine order parameters (e.g., print specifications, quantity, size, color, delivery, schedule, etc.).
5. Determine supplier based on costs and fulfillment of requirements.
6. Order registration packets.
7. Determine when registration packets are prepared based on size and complexity of event, timing issues related to insert preparation and timeliness of information.
8. Determine who will prepare packets (e.g., in-house personnel, hired temporary help, fulfillment agent, volunteers, etc.).
9. Collect all items to be inserted in packets.
10. Prepare packets in advance of on-site registration activity.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Registration packets are selected, ordered and prepared with all necessary items.

PROCESS

All performance elements for selecting, ordering and preparing registration packets are critical and must be performed in sequence.

DEVELOP PROCEDURES FOR PUBLISHING REGISTRATION LIST.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Data on past registration procedures and patterns
Name of registration supplier
Computer/printer/manuals

WORK TO BE PERFORMED

Develop procedures for publishing advance registration list.

PERFORMANCE CRITERIA

Procedures for publishing registration list are developed taking into account information to be included, type of format and distribution method.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on registration guidelines.

PERFORMANCE ELEMENTS

1. Decide what information will be included on registration list.
2. Determine information format (e.g., alphabetical, by name or company, registrant category, etc.).
3. Establish method of distribution (e.g., mail, computer diskette, e-mail, etc.).
4. Decide who should receive list (e.g., registrants, exhibitors, nonparticipating suppliers, etc.).
5. Establish distribution format of information (e.g., list, address labels, etc.) dependent on recipients.
6. Review plans with registration supplier and determine cutoff date, preparation costs and distribution date.
7. Distribute registration lists.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Procedures for publishing registration list are developed.

PROCESS

All performance elements for developing procedures for publishing registration list are critical and must be performed in sequence.

PLAN AND SET UP REGISTRATION AREA.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Registration supplier contract
Registration layout summary from previous meetings
Facility contract and floor plans
Telecommunication hookups data
Signage data
Setup and tear out schedules

WORK TO BE PERFORMED

Plan and set up registration area

PERFORMANCE CRITERIA

Registration area layout is planned and set up to meet needs of registrants.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending upon number of registrants and type of registration.

PERFORMANCE ELEMENTS

1. Determine registration area needed based on type and level of on-site activity (e.g., advance check-in, on-site registration, attendee vs. exhibitor, etc.).
2. Determine support areas (e.g., fill-out counters, tour registration, accounting office/cash room, etc.).
3. Review facility floor plans and select best location based on square footage requirements, traffic flow, proximity to meeting activity, etc.
4. Determine layout of equipment in selected area based on on-site registration procedures, traffic flow, electrical/telephone availability, etc.
5. Order additional electrical and telecommunication services as required based on preferred layout.
6. Decide on signage for registration area and directional signs to area from key event and/or facility locations.
7. Review plans with facility and registration supplier to develop setup and tear out schedules.
8. Determine supplier based on costs and fulfillment of requirements.
9. Order equipment and services in writing and understand all applicable charges.
10. Implement plan.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Registration area is planned and set up.

PROCESS

All performance elements for planning and setting up registration management system area are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

PLAN AND IMPLEMENT ON-SITE REGISTRATION PROCEDURES.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Registration history from previous meetings
Registration reports from previous meetings
Registration supplier contract
Computer/printer/manuals

WORK TO BE PERFORMED

Plan and implement on-site registration procedures.

PERFORMANCE CRITERIA

On-site registration procedures are planned and implemented to meet organizational objectives.

Skill is performed at 100% accuracy.

Time required to complete the skill varies depending upon number of registrants

PERFORMANCE ELEMENTS

1. Determine number of personnel needed to handle registration based on organization's policies, complexity of event, budget and physical space constraints.
2. Determine personnel schedule (e.g., overtime, double-time, breaks, etc.).
3. Determine type of personnel needed (e.g., supervisors, clerks, cashiers, bonded personnel, messengers, security, etc.).
4. Determine source of personnel (e.g., member volunteers, convention bureau, hotel, organization staff, etc.).
5. Determine communication procedures (e.g., written instruction, on-site training, etc.) with personnel concerning registration and information/services.
6. Set up procedures and accounting controls for cash, credit cards, purchase orders, refunds, etc.
7. Determine methods to be used regarding tracking and reports (e.g., daily registration activity, other event activity, accounting reports, etc.).
8. Develop instruction/training outline (e.g., responsibilities, form review, fee review, special policies, problem-solving, etc.).
9. Register attendees according to plan.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

On-site registration procedures are planned and implemented.

PROCESS

All performance elements for planning and implementing on-site registration procedures are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SELECT SHIPPING METHOD AND CARRIER.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Office supplies/printed materials/exhibit materials
Past shipping history data
List of items to be shipped
List of carriers
Computer/printer/manuals

WORK TO BE PERFORMED

Select shipping method and carrier.

PERFORMANCE CRITERIA

Shipping method and carrier are selected to meet needs of organization.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on shipping method and carrier chosen.

PERFORMANCE ELEMENTS

1. Review list of items to be shipped to meeting.
2. Review timeline (i.e., "drop dead" shipping dates) for shipment to be picked up from organization and for delivery of shipment to event.
3. Determine best shipping method (e.g., parcel post, rail, truck, air, ocean, personal vehicle, vanlines, etc.).
4. Research different types of carriers available.
5. Interview each carrier to determine their knowledge and experience in trade show industry.
6. Research carrier references – contact their clients to see if their service met their expectations.
7. Determine if shipping will be used as source of revenue for organization, as means of transporting event materials only or as negotiation tool with general service contractor.
8. Select shipping method and carrier that fits needs of meeting.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Shipping method and carrier are selected.

PROCESS

All performance elements for selecting shipping method and carrier are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

CREATE AND COMPLETE CONTROL SHEET.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Office materials/exhibit materials
Past shipping history data
List of items to be shipped
Carrier agreements
Computer/printer/manuals

WORK TO BE PERFORMED

Set up and complete control sheet with spaces to indicate all necessary information.

PERFORMANCE CRITERIA

Control sheet that records movement of all shipments is created.

Skill is performed with 100% accuracy.

Time required to complete skill varies depending on complexity of the control sheet.

PERFORMANCE ELEMENTS

1. Create complete list of items to be shipped.
2. Determine which items should be shipped and which should be hand-carried to event (e.g., don't ship items that if lost, can't be replaced, such as registration materials, etc.).
3. Create control sheet to record movement of each package.
4. Include spaces on control sheet for the following:
   a. Contents of package
   b. Numbering of each package
   c. Name of shipping company
   d. Date shipped
   e. Date received
   f. Waybill or bill lading number
4. Make list of contents of each package or box and carry it to meeting.
5. Complete all information on control sheet except date received.
6. Send copy to appropriate person at meeting site.
7. Instruct on-site representative to check off each package on control sheet as it is delivered.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Control sheet is created and completed.

PROCESS

All performance elements for creating and completing control sheet are critical and must be performed in sequence.

COMPLETE SHIPPING INFORMATION AGREEMENT.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Shipping Control Sheet
Name of facility's and/or general service contractor's contact person
Statement of facility's and/or general service contractor's shipping policies and procedures
Carrier agreements
Past shipping history data

WORK TO BE PERFORMED

Complete shipping information agreement.

PERFORMANCE CRITERIA

Shipping information agreement is completed according to the shipping control sheet.

Skill is performed with 100% accuracy.

Time required to complete the skill is one day.

PERFORMANCE ELEMENTS

1. Determine on-site facility or general service contractor contact person responsible for movement of freight in and out of facility.
2. Research the following:
    a. Where shipped items will be stored
    b. Costs of drayage (i.e., movement of freight from dock to location within facility)
    c. Shipping label instructions for inbound shipments
    d. Name of facility person who will receive shipping and can supply information about packages
    e. Method by which facility contact person will provide notification of shipment arrivals
    f. Maximum size and weight of packages that facility will accept along with elevator and door sizes and floor-load capacities
    g. If event is a targeted event (Specific dates and times are required for delivery of shipments for specific areas of events and penalties apply if shipments are received after their targeted move in period.)
    h. Facility's policy covering liability for facility-damaged or misplaced shipments

   i. Assistance facility or general contractor will provide for unpacking, repacking and storing crates and trunks and whether or not charges are involved for these services
   j. If there will be a separate, secured area for high-value items to be stored
   k. If shipping internationally, research customs procedures for shipping to/from the country, and determine if a customs broker is required.
3. Clarify any information about receiving shipments that are unclear or uncertain.
4. Complete and sign agreement.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Shipping information agreement is completed.

PROCESS

All performance elements for completing shipping information agreement are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

INSTRUCT STAFF ON SHIPPING PROCEDURES.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Shipping control sheet
Carrier shipping agreement
Facility contact
General contractor contract
Shipping agreement with facility and contractor

WORK TO BE PERFORMED

Instruct staff on shipping procedures.

PERFORMANCE CRITERIA

Staff has all necessary shipping procedures and information.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on size of staff and complexity of shipping procedures.

PERFORMANCE ELEMENTS

1. Provide staff with copy of shipping control sheet and instruct them on how to use it.
2. Provide staff information about carrier shipping agreement.
3. Review instruction about completion of shipping control sheet.
4. Inform staff about facility contact person, general service contractor contact person and shipping agreements with facility and contractor.
5. Review guidelines for shipping.
   a. Use corrugated cartons or sturdy packaging to prevent breakage.
   b. Pack cartons so contents fill carton or use newspaper or other filler material to keep contents from shifting.
   c. Seal cartons with two inch wide tape made specifically for this purpose.
   d. Include duplicate address label inside box.
   e. Do not wrap carton in brown paper unless absolutely necessary.
   f. Make legible labels for inbound and outbound shipments.. Avoid post office box numbers and use street addresses instead.
6. Inform staff of shipment schedules allowing enough lead time so that cartons arrive at site a few days prior to meeting if facility has storage available.
7. Provide staff instructions about on-site repacking policies.
8. Gather items to be shipped into one centralized area for carrier pickup.
9. Create shipping control sheet for outbound shipments.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Staff is instructed on all shipping procedures.

PROCESS

All performance elements for instructing staff on shipping procedures are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

INSURE SHIPMENTS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Shipping control sheet
Value of items to be shipped
Carrier's shipping agreement
Facility's shipping agreement

WORK TO BE PERFORMED

Insure shipments for meeting.

PERFORMANCE CRITERIA

All items shipped to meeting are covered by adequate insurance based on value of item.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on insurance coverage needed.

PERFORMANCE ELEMENTS

1. Review carrier agreement and facility agreement.
2. Determine insurance limits provided by carrier and facility.
3. Determine what amount and type of insurance (i.e., damage, theft, loss, etc.) is needed on items to be shipped.
4. Review items to be shipped and value of items.
5. Review existing business insurance and check with insurance agent about creating a rider on existing policy for event shipments.
6. Declare value on shipments on all shipping paperwork (i.e., airbills, bills of lading, etc.).
7. Purchase necessary insurance.
8. Record policy numbers and file policy.
9. Collect receipts of items to be shipped to verify value.
10. Identify contact person from insurance company, carrier, facility and general contractor in case of a problem.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Shipments are insured according to value.

PROCESS

All performance elements for insuring shipments are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

CREATE FINAL PROGRAM.

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MEETING AND FUNCTION ROOMS

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Schedule for meeting
Previous meeting history
Post Convention Reports from prior events
Meeting room components
Completed RFP
Site inspection checklist
Requests for room layout
Equipment needs
Computer/printer/manuals

WORK TO BE PERFORMED

Create final written program.

PERFORMANCE CRITERIA

Write-up of final program is completed, listing function rooms with diagrams and meeting times with set up and break down times established.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on meeting requirements.

PERFORMANCE ELEMENTS

1. Create a working master list of all meeting and banquet functions and their uses, updating as needed.
2. Review past meeting history and all requests from program committee and presenters.
3. Determine if meeting is a food function (e.g., breakfast, luncheon or dinner meeting, etc.).
4. Identify size of room needed for each function.
5. Consider the following for each meeting or session:
   a. Objectives
   b. Participants' safety and comfort
   c. Audiovisual requirements
   d. Speaker focus
   e. Traffic flow
   f. Restroom accessibility
   g. Convenience of food and beverage service
   h. Facilities for persons with disabilities
   i. External noise

6. Consider function's space requirements for board meeting and wrap-up sessions to be held before and after meeting dates.
7. Determine office space for staff and press representatives as well as storage space for equipment.
8. Arrange advance clearance for any outside contractors that may be coming into function rooms. Provide full list of these contractors with each function sheet.
9. Check with facility regarding union requirements on labor to be used and any exclusive arrangement facility may have with a particular vendor which may preclude bringing in ones' own supplier.
10. Finalize program.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Final program is created.

PROCESS

All performance elements for creating final program are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

CHOOSE SETUP FOR EACH FUNCTION.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Previous meeting history data
Written requests of program committee and presenters
Statement of facility's policy and procedures
Final Program
Computer/printer/manual

WORK TO BE PERFORMED

Choose setup for each function.

PERFORMANCE CRITERIA

Setup for each function is identified and diagramed following final program guidelines.

Time required to complete the skill varies depending on number of requests of program committee and presenters.

PERFORMANCE ELEMENTS

1. Choose setup for each function room depending on requirements of each event and potential and limitations of any given room.
    a. auditorium or theater
    b. classroom
    c. working groups in diamond, octagon, etc.
    d. banquet and others
2. Create function room diagram for each event.
3. Develop rationale for setup of each function
4. Send function room setup to proper personnel at facility.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Setup for each function is determined.

PROCESS

All performance elements for choosing setup for each function are critical. Performance elements are numbered to show an appropriate sequence for completing the skill: however, a different sequence may be used.

IDENTIFY AND ARRANGE FOR EQUIPMENT.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Budget
Previous meeting history data
Written equipment requests from presenters
Statement of facility's policy and procedures
Equipment inventory sheet
Workers' schedule
Final Program
List of meeting components
List of union regulations
Computer/printer/manuals

WORK TO BE PERFORMED

Identify and arrange for equipment.

PERFORMANCE CRITERIA

All equipment requested is available and functional.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on equipment needs and worker availability.

PERFORMANCE ELEMENTS

1. Review past meeting history and equipment requests of presenters.
2. Draw up a list of requirements including all materials, services and equipment needed.
3. Take an inventory of facility's basic supplies prior to meeting to see if there may be shortages.
4. Determine charges for equipment, supplies, labor, electrical, etc. that will be needed.
5. Inquire about union rules that could affect use of equipment.
6. Determine when room will be set up, availability of setup crew to work overtime or on weekends, adequate workers to handle all facility needs, etc.
7. Check on basic function room provisions such as the following:
    a. Chairs (e.g., stack, swivel, upholstered, armchairs, etc.)
    b. Tables (e.g., round, half-round, rectangular, etc.)
    c. Lecterns, podiums
    d. Platforms

   - e. Public address system (e.g., mixer, operator, etc.)
   - f. Microphones
   - g. Electricity—AC-DC current, capacities, outlet locations
   - h. Extension cords
   - i. Blackboards, bulletin boards and easels
   - j. Audiovisual equipment (e.g., overhead or video projection, computer projection, film or multimedia, etc.) and adequate-sized screen
   - k. House lights, audio and temperature control
   - l. Supplies (e.g., name cards, notepads, pencils, water pitchers, glasses, flags, signs, banners, piano, wastebaskets, table skirts, etc.)
   - m. Supplements with outside suppliers, if necessary

8. Identify supplementary provisions to be provided through outside supplier.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Equipment is identified and arranged for each function.

PROCESS

All performance elements for identifying and arranging for equipment are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

NEGOTIATE AND CONTROL FUNCTION ROOM CHARGES.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Budget
Past meeting history data
Final Program
Projected food and beverage expenditures
Number of sleeping rooms to be occupied
Exhibit space usage data
List of union regulations
Computer/printer/manuals

WORK TO BE PERFORMED

Negotiate and control meeting room and banquet room charges.

PERFORMANCE CRITERIA

Meeting and function room rates are negotiated at best rates and are within budget guidelines.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on scope of negotiations.

PERFORMANCE ELEMENTS

1. Review past meeting history for attendance, rooms booked and function and exhibit space used.
2. Check facilities' established rates based on length of time a given area is used. Also check on additional rates for equipment, etc.
3. Review by facility an approach to set function's room charges referred to as "room pickup" approach, which will vary. One approach sets an actual number of units to be occupied and if number mutually agreed upon falls below set number, some charges for function rooms will be made. Sometimes function's room rentals may be reduced if "sleeping room pickups" are at or above a certain level.
4. Determine all charges and whether charges include the following:
   a. Seating
   b. Tables
   c. Risers
   d. Head tables
   e. Audiovisual equipment
   f. Special power
   g. Special setups

h. Setup labor
i. Audiovisual labor
j. Electricians
k. Meeting-room rental
l. Other miscellaneous.

Note: Should facility not be able to provide certain supplies or services, inquire regarding facilities' regulations on outside vendors and include those charges.

5. Determine time basis for booking (e.g., 24 hours, hourly, or day/evening, etc.).
6. Estimate setup and teardown times; establish and abide by release dates.
7. Total all charges to determine if charges are within projected budget for meeting.
8. Recommend changes if total charges exceed planned budget.
9. Sign written agreement after all details are worked out.
10. Maintain daily checks on charges throughout meeting to control expenses.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Function room charges are negotiated.

PROCESS

All performance elements for negotiating and controlling function room charges are critical and must be performed in sequence.

INSPECT EXHIBITION AREA.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Past exhibit history data
Map of layout of area within facility for exhibit
List of potential exhibitors
Computer/printer/manuals

WORK TO BE PERFORMED

Inspect exhibition area.

PERFORMANCE CRITERIA

Exhibit areas are inspected to meet needs of potential exhibitors.

Skill is performed with 100% accuracy.

Time required to complete the skill is two to three hours.

PERFORMANCE ELEMENTS

1. Determine exhibit space needed based on the following:
   a. Past exhibit history
   b. Projected number of exhibiting companies and required booth space
   c. Total projected attendance, (e.g., attendees, exhibitors, guests, etc.)
   d. Support areas (e.g., concessions, registration, offices, etc.)
2. Inspect exhibit area for:
   a. Total square footage
   b. Obstructions (e.g., columns, vents, ducts, etc.)
   c. Floor load
   d. Floor construction material
   e. Ceiling heights
   f. Ventilation control
   g. Access areas – handicap easements
   h. Maintenance and housekeeping
   i. Restroom location
   j. Restaurant/concession areas
   k. Emergency exits
   l. First aid availability
   m. Lighting, type, foot-candles at floor

3. Check the following for access to exhibit area:
   a. Streets and area road construction
   b. Parking
   c. Doorways and corridors
   d. Elevators
   e. Number and type of docks
   f. Exhibit area limitations (e.g., weight, dimension, delivery schedules, traffic, etc.)
   g. Security issues
4. Obtain floor plans and check them for the following:
   a. Scale correctly shown
   b. All dimensions shown
   c. Variations shown (e.g., floor loads, ceiling heights, obstructions, etc.)
   d. Entrances, exits marked
   e. Utility access shown
   f. Construction plans for building attached
5. Investigate utilities in detail including the following:
   a. Limitations, accessibility
   b. Electricity
   c. Power
   d. Gas
   e. Compressed air
   f. Steam
   g. Water
   h. Drain
   i. Communications vehicle (e.g., telephone, data lines, cable, Internet, etc.)
6. Inquire about labor for the following:
   a. Carpenters
   b. Electricians
   c. Plumbers
   d. Riggers
   e. Other skilled laborers
   f. Union requirements
   g. Labor contract status

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Inspection of exhibit area is completed and meets all requirements for meeting.

PROCESS

All performance elements for inspecting exhibit area are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Past exhibit history data
Square footage data
List of booth types
List of service contractors
Contract specifications
Request for Proposal (RFP)

WORK TO BE PERFORMED

Select service contractors/vendors.

PERFORMANCE CRITERIA

Service contractors/vendors are selected to meet needs of management and exhibitors.

Time required to complete the skill varies depending of number of respondents and extent of services to be provided.

PERFORMANCE ELEMENTS

1. Determine services needed by exhibitors and show management.
2. Create RFP's for the following services:
   a. General contractor
   b. Security
   c. Floral
   d. Audiovisual
   e. Cleaning
   f. Ancillary (e.g., water coolers, hostesses/models, etc.)
3. Distribute RFP's to list of potential suppliers.
4. Receive and review proposals.
5. Select service contractors/vendors.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Service contractors/vendors are selected.

PROCESS

All performance elements for selecting service contractors/vendors are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

DETERMINE EXHIBIT COSTS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Statement of plans for exhibits/exposition
Meeting budget
Preliminary list of exhibitors
Service contractors'/vendors' agreements
Computer/printer/manuals

WORK TO BE PERFORMED

Determine exhibit costs.

PERFORMANCE CRITERIA

Exhibit costs are determined according to operating plan and meeting budget.

Skill is performed with 100% accuracy.

Time required to complete the skill is one to two days.

PERFORMANCE ELEMENTS

1. Develop operating plan and budget that spell out details of anticipated income and expenses.
2. Project as accurately as possible what, when and how money will be spent on registration, exhibitor promotion, on-site operations, attendance promotion, etc.
3. Determine facility space rates and labor costs including:
   a. Rate
   b. Coverage included (e.g., area, facility, equipment, services, etc.)
   c. Payment, deposit requirements
   d. Insurance requirements
4. Budget signage costs and identify sources.
5. Spell out costs in contracts with facility and service contractors/vendors.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Exhibit costs are determined.

PROCESS

All performance elements for determining exhibit costs are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

DETERMINE SIGNAGE AND BOOTH DECORATIONS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Statement of operating plans and budget for exhibits
List of exhibitors
Drawing of layout of exhibit area in facility
Drawing of layout of ancillary areas
Computer/printer/manuals

WORK TO BE PERFORMED

Determine signage and booth decorations.

PERFORMANCE CRITERIA

Signage and booth decorations for exhibits are within budget guidelines.

Time required to complete the skill varies depending on operating plans and budget for exhibits.

PERFORMANCE ELEMENTS

1. Identify signage sources and budget costs.
2. Plan signs that consider the following:
   a. Booth and aisle identification
   b. Meeting rooms, pressroom and various show offices
   c. Directions
   d. Exhibitor and special event listings
   e. Ticket sales
   f. Exhibit hours
   g. Concessions areas
3. Identify all booth decorations and costs to include the following:
   a. Draperies and carpet
   b. Furniture
   c. Entrance ways
   d. All-inclusive rental exhibit booths
   e. Hardwall
4. Identify sources of signage and booth décor for the following:
   a. Convention center/exhibit hall
   b. Hotel
   c. Bureau
   d. Associations
   e. Service contractors/vendors
   f. Exhibitors

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Signage and booth decorations are determined.

PROCESS

Performance elements for determining signage and booth decorations are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

DETERMINE SHIPPING DETAILS FOR EXHIBITS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Statement of facilities' policies and procedures
List of exhibitors and booth requests
Service contractors'/vendors' agreements
Computer/printer/manuals

WORK TO BE PERFORMED

Determine shipping details for exhibits.

PERFORMANCE CRITERIA

Shipping details for exhibits are determined and communicated to appropriate persons.

Time required to complete the skill is one to two days.

PERFORMANCE ELEMENTS

1. Review facility's shipping policies and procedures and clarify details with facility meeting planner.
2. Review booth requests received from exhibitors.
3. Determine exact shipping address to be used.
4. Decide on drayage.
5. Determine check-in, check-out procedure at exhibit area.
6. Prepare schedule of placement in booths and removal.
7. Determine storage facilities for empty crates and products.
8. Determine advance and direct shipping procedures.
9. Determine move out procedures.
10. Communicate all shipping information to exhibitors and others.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Shipping details for exhibits are determined.

PROCESS

All performance elements for determining shipping details for exhibits are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

REVIEW INSURANCE AND LIABILITY CONTRACTS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Insurance and liability contracts
Certificates of insurance from service providers
Computer/printer/manuals

WORK TO BE PERFORMED

Review insurance and liability contracts.

PERFORMANCE CRITERIA

Insurance and liability contracts are reviewed for clarity and understanding of all provisions.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on length and complexity of insurance and liability contracts.

PERFORMANCE ELEMENTS

1. Review insurance and liability contracts for accident clauses.
2. Check on conditions and amount of damages covered.
3. Review terms of fire and theft.
4. Check on terms of personal and organizational liability.
5. Review all other terms of contracts.
6. Review all certificates of insurance.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Insurance and liability contracts are reviewed, signed and understood.

PROCESS

All performance elements for reviewing insurance and liability contracts are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

DETERMINE EXHIBIT GUIDELINES.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Facility layout map for area exhibits will occupy
List of potential exhibitors
List of approved service contractors/vendors
Computer/printer/manuals

WORK TO BE PERFORMED

Determine exhibit guidelines.

PERFORMANCE CRITERIA

Exhibit guidelines for exhibit areas are determined according to specifications outlined in facility layout.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of exhibits.

PERFORMANCE ELEMENTS

1. Decide on exhibit booth limitations taking into consideration the following:
    a. Booth size (e.g., height, weight, etc.)
    b. Lighting
    c. Wiring (e.g., extension cords, data lines, telephone cords, etc.)
    d. Hanging signs
    e. Operating displays
    f. Noise
    g. Food and beverage
    h. Personnel
    i. Giveaways
2. Determine the following factors in booth assignment policy:
    a. Eligibility
    b. Length of membership in organization
    c. Priority based on past participation
    d. Order of receipt of application and payment
    e. Square footage
3. Determine overall exhibit guidelines taking into consideration the following:
    a. Schedules
    b. Eligibility
    c. Application procedures and payment policy
    d. Booth assignment policy
    e. Exhibit space details (e.g., overall diagrams, location of booths, registration area, information areas, etc.)

f. Costs
g. Rules and regulations, including exhibitor-appointed contractor's regulations
h. Shipping instructions
i. Labor
j. Insurance and liability

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Exhibit guidelines are determined.

PROCESS

All performance elements for determining exhibit guidelines are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

CREATE EXHIBITOR SERVICE MANUAL.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Exhibitor's guidelines
List of service contractors/vendors
Statement of facility's layout policy and procedures
International Association of Emergency Managers (IAEM) standards/regulations

WORK TO BE PERFORMED

Create exhibitor service manual.

PERFORMANCE CRITERIA

Manual is created with all exhibitor guidelines in accordance with facility layout policy and procedures.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of exhibitors.

PERFORMANCE ELEMENTS

1. Identify the following introductory information:
   a. Name of event/date/location
   b. Move in/move out dates and information
   c. Names and addresses of service contractors/vendors
   d. Contractor's payment policies and dates
   e. Union regulations
   f. Table of contents
2. Identify basic information and order forms for the following:
   a. Rental furniture
   b. Decorations and carpeting
   c. Shipping, receiving and drayage
   d. Setup and dismantling labor
   e. Electrical service
   f. Plumbing service
   g. Booth cleaning

3. Identify the following additional services:
   a. Carrier/freight forms
   b. Telephone service
   c. Photography
   d. Floral/plant rental
   e. Security
   f. Models/demonstrators
   g. In-booth food services
4. Create exhibitor service manual.

PERFORMANCE ASSESSMENT CRITERIA

IAEM standards/regulations are followd.

PRODUCT

Exhibitor service manual is created.

PROCESS

All performance elements for creating exhibitor service manual are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

PROVIDE PRE-FUNCTION INFORMATION TO EXHIBITORS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Exhibit booth guidelines
List of exhibitors
Exhibitors' service manual
Computer/printer/manuals

WORK TO BE PERFORMED

Provide pre-function information to exhibitors.

PERFORMANCE CRITERIA

Exhibitors are provided a complete packet of exhibit information.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of exhibitors.

PERFORMANCE ELEMENTS

1. Collect the following data needed for booth assignments from exhibitors:
   a. Product category
   b. Square footage
   c. Location choices
   d. Display specifics (e.g., dimensions, weight, [operating/static], special characteristics, etc.)
   e. Utilities required
   f. Proximity to competitors
2. Complete exhibitor space contracts.
3. Send booth assignment notices to exhibitors and include the following information:
   a. Booth number
   b. Booth size
   c. List of exhibitors
   d. Invoice
4. Send all signed exhibitors a detailed manual at least 90 days before expositions.
5. Provide service contractors/vendors and facility copies of the following exhibit information:
   a. Exhibitor contract
   b. Booth size and location
   c. Shipment details
   d. Signage, utility and labor requirements
   e. Other facilities, equipment and services required

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Pre-function information is provided to exhibitors.

PROCESS

All performance elements for processing a capital budget are critical. The steps of performance are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

PROMOTE EXHIBITOR PARTICIPATION.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

List of exhibitors and products
Budget
Registrant profile data
Computer/printer/manuals

WORK TO BE PERFORMED

Promote exhibitor participation.

PERFORMANCE CRITERIA

Event is promoted and publicized to potential exhibitors.

Time required to complete the skill varies depending on promotion and publicity determined necessary.

PERFORMANCE ELEMENTS

1. Provide exhibitors with attendees' profiles.
2. Communicate event information using the following means:
   a. Industry specific print media.
   b. Direct mail
   c. Radio and TV announcements
   d. Press releases
   e. Invitations
   f. Website links
   g. Exhibits at similar tradeshows

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Exhibitor participation is promoted.

PROCESS

All performance elements for promoting exhibitor participation are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

ESTABLISH EXHIBIT OPERATION PROCEDURES.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Exhibitors' service manual
List of exhibitors
Event program
Exhibit facility rental contract
Copy of evaluation tool
Computer/printer/manuals

WORK TO BE PERFORMED

Establish exhibit operation procedures.

PERFORMANCE CRITERIA

Exhibit procedures are established according to exhibitors' service manual.

Skill is performed at 100% accuracy.

Time required to complete the skill varies depending on number of exhibits.

PERFORMANCE ELEMENTS

1. Determine timeline for the following:
   a. Management's move in/move out dates
   b. Exhibitors' move in/move out dates
   c. Movement of freight (e.g., advance to warehouse, direct to show site, target for specific dates, etc.)
   d. Inspection of exhibit hall prior to opening
2. Determine admission policy taking into account the following:
   a. Types of admission to exhibits (e.g., open, badge, charge, other, etc.)
   b. Attendees' classifications (e.g., staff, registrants, exhibitor, press, public, etc.)
   c. Off-hour admissions
   d. Minimum age requirement of attendees
3. Determine type of security needed.
   a. Pre-show, during show and after show
   b. Booth and perimeter
4. Develop procedures for the following:
   a. Handling complaints
   b. Reporting thefts
   c. Staff contacting of security personnel
   d. Removing items from show floors
5. Distribute evaluation tools to exhibitors.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Exhibit operation procedures are established.

PROCESS

All performance elements for establishing exhibit operation procedures are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used

PLAN FOOD AND BEVERAGE NEEDS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Past meeting history data
Information on local laws and regulations regarding food and beverages
List of union regulations
List of hours and capacities of each public dining area
List of hospitality suite requests
Statement of program plan

WORK TO BE PERFORMED

Plan food and beverage needs for all meeting functions.

PERFORMANCE CRITERIA

Food and beverage needs are planned for every meeting function according to program plan and local laws and regulations.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of food and beverage functions planned.

PERFORMANCE ELEMENTS

1. Review past meeting records of previous functions by examining the following:
   a. Projected versus. actual attendance
   b. Number and type of functions
   c. Menus including special dietary or religious restrictions
   d. Number and type of beverages served per person for meals and receptions
   e. Projected vs. actual budgets
   f. Guarantee
   g. Size and setups of rooms
   h. Gratuities policy
   i. Room service patterns and hotel outlet usage (Review both patterns with regard to meal periods when no group meal function was planned.)
2. Develop a schedule for each function considering the following:
   a. Type and location of function (e.g., business, social, etc.)
   b. Need for musicians, entertainers, emcee, ushers and others
   c. Time conflict or overlap with other events in facility
   d. Time for movement of attendees
   e. Expected attendance
   f. Person(s) responsible for each function
3. Establish a working budget that will include costs for the following:
   a. Room rental
   b. Food and beverage

   c. Services
   d. Gratuities
   e. Entertainment fees, unions' requirements, maintenance, taxes, travel expenses and music license fees
   f. Special equipment
   g. Souvenirs, awards, gifts, decorations and table arrangements.
4. Plan menus and beverages for each function considering all factors.
   a. Providing copy of menu selections and prices
   b. Type of meal and beverage service to be used
   c. Special dietary needs required.
5. Determine room layout (e.g., staging, display tables, etc.).
6. Determine decorations (e.g., linens, centerpieces, etc.).
7. Follow local laws and regulations including the following:
   a. Union regulations on minimum number of waiters, musicians and bartenders
   b. Working overtime
   c. Facility setup labor
   d. Serving of liquor
   e. Facility's policies on outside liquor supplies
   f. Lounge and room service hours and regulations
   g. Fire codes
8. Ensure special/outside services are identified and contracts completed.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Food and beverage needs are planned, completed and contracted for all meeting functions.

PROCESS

All performance elements for planning food and beverage needs are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

NEGOTIATE COSTS.

FOOD AND BEVERAGES

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Food and beverage budget
Number of persons attending each function
Computer/printer/manuals

WORK TO BE PERFORMED

Negotiate costs for food and beverages.

PERFORMANCE CRITERIA

Food and beverage costs are negotiated within budget guidelines.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of functions.

PERFORMANCE ELEMENTS

1. Negotiate discount published prices based on numbers of sleeping and meeting rooms, exhibit space booked and length of contract.
2. Agree on percentage to pay above current prices when negotiating food costs more than six months out. Also agree on gratuity percent when negotiating more than six months out.
3. Decide on method used to determine charges (e.g., signed guarantee, number of meal tickets collected, quantities consumed, etc.).
4. Set cutoff date for guaranteed attendance.
5. Determine percentage above guarantees facility will supply and incremental price, if any, for latecomers.
6. Negotiate beverages by gallon and bottle. Compare beverage prices by gallon and bottle versus charging on a consumption basis.
7. Determine minimum number of servers and bartenders for each function and accompanying charges for them. (A full service property sets the appropriate amount and includes it in the food and beverage prices. Charges are made for a request for additional servers.)
8. Stipulate basis for federal, state and local tax charges. Notify site if group holds a state tax exemption status and validate status with appropriate paperwork.
9. Determine insurance requirements and potential fines related to alcohol sales.
10. Detail any other surcharges (e.g., ice, corkage, setups, etc.).
11. Plan menus.
12. Finalize details of each food and beverage function.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Food and beverage costs are negotiated.

PROCESS

All performance elements for negotiating costs critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SELECT ROOMS AND SETUPS FOR FUNCTIONS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Statement of purpose and list of activities of functions
Number of persons attending each function
List of rooms available with potential capacity and limitations identified
Computer/printer/manuals

WORK TO BE PERFORMED

Select rooms and setups for functions.

PERFORMANCE CRITERIA

Rooms and setups for functions are selected according to function's purpose, type of activities and number of persons attending each function.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of function rooms and setup requested.

PERFORMANCE ELEMENTS

1. Inspect possible function sites for the following:
    a. Sufficient space
    b. Adequate electrical outlets and voltage capabilities
    c. Adequate data line ports and telephone lines
    d. Good acoustics, lighting and ventilation
    e. Columns and other obstructions
    f. Accessibility of exits, restrooms, dressing rooms and telephones
    g. Accessibility for persons with disabilities
2. Consider possible off-premises location for catered event as a creative alternative.
3. Work with a scaled diagram in selecting room setups taking into consideration the following:
    a. Type of activities, purpose and desired atmosphere
    b. Expected attendance
    c. Number and dimensions of tables
    d. Type of food service
    e. Best table placement
    f. Décor and entertainment

4. Determine location and dimensions of stage, platform and dance floor taking into account the following:
   - a. Proscenium height
   - b. Runways
   - c. Ramps
   - d. Risers
   - e. Access aisles
   - f. Floor covering
5. Consider items needed for head tables such as the following:
   - a. Platform
   - b. Additional two feet of space for lectern
   - c. Special chairs
   - d. Place cards
   - e. Special services, decorations, beverages and gifts
   - f. Special seating arrangements
   - g. Ramp for persons with disabilities accessibility
6. Plan for decorations considering the following:
   - a. Colorful centerpieces
   - b. Meeting theme
   - c. Room décor and props
7. Finalize room selections and setups.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Rooms and setups are selected for each function.

PROCESS

All performance elements for selecting rooms and setups for functions are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

IDENTIFY PRE-EVENT ARRANGEMENTS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Completed program
Registration numbers
Staff assignment sheet
Computer/printer/manuals

WORK TO BE PERFORMED

Identify pre-event arrangements.

PERFORMANCE CRITERIA

Pre-event arrangements are made according to meeting program.

Skill is performed with 100% accuracy.

Identifying pre-event arrangements is an on-going activity during planning

PERFORMANCE ELEMENTS

1. Review meeting program and determine organization/group staffing needs for each function.
2. Provide system for notifying attendees of any changes in function location.
3. Instruct organization/group staff and attendees on the following:
    a. Seating procedures
    b. Assignments at alternate locations
    c. Handling admissions, tickets and cash collection
    d. Special meal requests
4. Check periodically that all instructions of facility regarding menu, table, seating arrangements, etc., are being carried out in regard to the following:
    a. Room setups
    b. Ticket sales
    c. Cocktails
    d. When doors open
    e. Seating of head-table guests
    f. Special opening ceremonies
    g. Food service
    h. Tables cleared
    i. Speakers
    j. Music, entertainment and dancing
5. Make and/or distribute posters, signage, seating lists, place cards, menus, programs, and gifts.

6. Assign organization/group staff members to do the following:
   a. Serve as ticket collectors, cashiers, ushers and escorts for special guests
   b. Coordinate attendance and consumption revisions with catering department
7. Identify entertainers' food and beverage requests.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Pre-event arrangements are identified.

PROCESS

All performance elements for processing accrual for capital asset deprecation are critical. The steps of performance are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

IDENTIFY POST-FUNCTION TASKS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Meeting program
Copy of written agreements with facility
Staff assignment sheet
Inventory sheet
Computer/printer/manuals

WORK TO BE PERFORMED

Identify post-function tasks.

PERFORMANCE CRITERIA

Post-function tasks are identified according to meeting program and agreement with facility.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of post-function tasks.

PERFORMANCE ELEMENTS

1. Review program and identify every function that will have post-function tasks.
2. Assign staff to be responsible for each identified task.
3. Distribute tips if applicable.
4. Arrange for cleanup, including picking up any extra meeting or convention materials.
5. Supervise inventory, including return of unused beverages, mixes and/or food.
6. Review billing, accounting and check out procedures with facility staff.
7. Ask facility to return all food and beverage function tickets or stubs after they've finished their bookkeeping to have controls as to number served.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Post-function tasks are identified.

PROCESS

All performance elements for identifying post-function tasks are critical and must be performed in sequence.

DETERMINE ROLE AND OBJECTIVES OF AUDIOVISUALS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Meeting program
Audiovisual request forms completed by speakers/presenters
Computer/printer/manuals

WORK TO BE PERFORMED

Determine role and objectives of audiovisuals.

PERFORMANCE CRITERIA

Audiovisuals for effective presentation are determined per each program/speaker's request.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending upon number of audiovisual request forms received.

PERFORMANCE ELEMENTS

1. Consider role of audiovisuals in meeting.
2. Determine if audiovisuals are to accompany a speaker presentation in form of illustrations or constitute core of presentation itself.
3. Decide if primary objective in using audiovisual media is to educate, entertain, build morale or some combination of these goals.
4. Select audio-visuals that best meet the need of the primary objective (e.g., overhead projectors, computer hookups, screens, VCRs, etc.)
5. Investigate the quality of the sound system, type of speakers and placement, microphones as to types and function, and the mixing system.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Role and objectives of audiovisuals are determined.

PROCESS

All performance elements for determining role and objectives of audiovisuals are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

DETERMINE EQUIPMENT/MATERIAL NEEDS FOR SPEAKERS.

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AUDIOVISUALS AND TELECONFERENCING

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Meeting program with speakers/presenters listed
Equipment/material request forms
Computer/printer/manuals

WORK TO BE PERFORMED

Determine equipment/material needs for speakers.

PERFORMANCE CRITERIA

Equipment/material needs of speakers are determined according to returned request forms.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of speakers and equipment/material needed.

PERFORMANCE ELEMENTS

1. Review forms returned by presenters identifying their equipment/material needs.
2. Review meeting program to identify audiovisual and other equipment/material needs for special events and effects.
3. Research equipment available and within budget guidelines and determine best choice for each presentation.
4. Confer with speakers, if necessary, and decide on best equipment choices.
5. Arrange rehearsal room on-site where each person can test equipment prior to actual session.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Equipment/material needs for speakers are determined.

PROCESS

All performance elements for determining equipment and material needs for speakers are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SCHEDULE MEETINGS ROOMS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Meeting program
Attendance estimates for each session
Computer/printer/manuals

WORK TO BE PERFORMED

Schedule meeting rooms.

PERFORMANCE CRITERIA

Meeting rooms are scheduled to meet session requirements.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of sessions.

PERFORMANCE ELEMENTS

1. Review program to determine number of meeting rooms needed based on estimated attendance.
2. Check each meeting room for the following:
   a. Room size
   b. Room setup
   c. Possible noise from other rooms
   d. Obstructions
   e. Door locations
   f. Accessibility for persons with disabilities
   g. Electrical capacity, wiring and outlet locations
   h. Ceiling height
   i. Window locations and shading capacity
   j. Wall, floor and ceiling acoustics
3. Select most appropriate room for each session.
4. Determine time prior to meeting to check equipment and/or practice.
5. Finalize rooms for every scheduled session.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Meeting rooms are scheduled

PROCESS

All performance elements for scheduling meeting rooms are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

COMPLETE ALL ARRANGEMENTS WITH ON-SITE COORDINATOR.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Meeting program
Audiovisual plan
Schedule for delivery of equipment and materials
Rooms schedule
Union representation
Computer/printer/manuals

WORK TO BE PERFORMED

Complete all arrangements with on-site coordinator.

PERFORMANCE CRITERIA

All arrangements are completed with on-site coordinator in consultation with union representative.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on scope of event.

PERFORMANCE ELEMENTS

1. Review all plans and go over each with on-site coordinator.
2. Meet with on-site coordinator and union representative to review details of meeting.
3. Ask that prior to setup all equipment requested be checked and in good working order.
4. Ensure that all staff who will be involved in running presentations and equipment is fully trained and able to deal with emergencies.
5. Make arrangements for teleconference prior to conference.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

All arrangements with on-site coordinator are completed.

PROCESS

All performance elements for completing all arrangements with on-site coordinator are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

IDENTIFY ATTENDEE PROMOTIONAL STRATEGIES.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Statement of meeting objectives
Meeting budget
List of audience to be reached
List of identified barriers to attendance
List of audience demographics
Dates for meeting
Computer/printer/manuals

WORK TO BE PERFORMED

Identify attendee promotional strategies.

PERFORMANCE CRITERIA

Identify attendee promotional strategies taking into account audience demographics, meeting objectives and meeting budget..

Skill is performed with 95% accuracy.

Time required to complete the skill varies depending on meeting objectives.

PERFORMANCE ELEMENTS

1. Review meeting objectives and demographics of anticipated attendees.
2. Discuss barriers and advantages to attendance.
3. Plan promotional strategies to increase attendance (e.g., expand mailing lists, advertise to generate leads, partner with exhibitors, etc.).
4. Develop appropriate promotional materials that include the following:
   a. Name of event
   b. Location, dates and times
   c. Registration hours
   d. Description of products and services displayed
   e. Registration fees
   f. Special attractions
5. Evaluate strength of each promotional strategy in attracting attendance and increasing event visibility.
6. Estimate costs for each promotional strategy.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Attendee promotional strategies are identified.

PROCESS

All performance elements for identifying attendee promotional strategies are critical and must be performed in sequence.

SECURE SPONSORSHIP/FUND-RAISERS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Meeting history data
Statement of meeting objectives
Meeting budget
List of previous sponsors
List of previous successful fund-raisers

WORK TO BE PERFORMED

Secure sponsorship/fund-raisers.

PERFORMANCE CRITERIA

Sponsors/ fund-raisers are identified and secured according to meeting objectives.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on sponsorship/ fund-raisers to be secured.

PERFORMANCE ELEMENTS

1. Review meeting history and meeting objectives.
2. Identify potential sponsors for all or part of meeting.
3. Identify the goals and objectives of potential corporate sponsors.
4. Create a connection between the potential corporate sponsors and the organization/meeting.
5. Secure sponsors and make arrangements for their participation.
6. Identify appropriate fund-raisers and select committee or task group to organize activity.
7. Promote corporate sponsored activities and fund-raisers into meeting program.
8. Promote sponsors and fundraising in all meeting advertisements.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Sponsorship/fund-raisers are secured.

PROCESS

All performance elements for securing sponsorship/fund-raisers are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

IMPLEMENT PROMOTIONAL PLAN.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Promotional budget
Mailing lists
Exhibitors' list
Meeting program
Computer/printer/manuals

WORK TO BE PERFORMED

Implement promotional plan.

PERFORMANCE CRITERIA

Promotional plan provides detailed schedule that follows week-by-week countdown to next convention.

Skill is performed with 98% accuracy.

Time required to complete the skill varies depending on meeting objectives.

PERFORMANCE ELEMENTS

1. Designate date to begin or kick off next year's meeting promotion. (Typically this is done at current year's meeting/convention through signage, handouts, video, etc.)
2. Proof all media and mailing lists.
3. Prepare news releases and send all releases to trade publications.
   a. Complete first news release about 40 weeks prior to meeting, announcing meeting date(s) and location.
   b. Complete second news release about 26 weeks prior to meeting, providing information about speakers, theme, exciting destination events and major benefits of general sessions and seminars.
   c. Complete third news release about 20 weeks prior to meeting, providing additional details about speakers and benefits of attendance.
   d. Complete fourth news release about 6 weeks prior to meeting, giving complete details about meeting, major benefits of attendance and feature possibilities for trade and consumer press.
4. Send mailings.
   a. Send first mailing about 24 weeks prior to meeting, providing details of meeting and promoting as many benefits as possible. Include housing and registration forms.
   b. Send second mailing about 16 weeks prior to meeting, including schedules of daily activities for entire meeting.

   c. Send third mailing about 8 weeks prior to meeting, providing latest information on speakers and other program attractions. Include housing and registration forms (unless pre registration is closed).

5. Place advertisements in trade journals with response device included at 24 weeks before meeting.
6. Distribute video to local association groups 24 weeks prior to meeting. (Video should include highlights of last year's meeting and endorsements of leaders and regular members.)
7. Place a cover story about meeting in association magazine, promoting benefits of attendance at 12 weeks prior to meeting.
8. Send invitations to media list 10 weeks prior to meeting, offering complimentary registration and admission to all functions.
9. Follow up press invitation via telephone one week before meeting.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Promotional plan is implemented.

PROCESS

All performance elements for implementing promotional plan are critical and must be performed in sequence.

PREPARE PROMOTIONAL MATERIALS AND PRESS RELEASES.

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PROMOTION AND PUBLICITY

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Statement of meeting objectives
Meeting program
List of exhibitors
List of scheduled entertainment
Site and location enhancement data
Computer/printer/manuals

WORK TO BE PERFORMED

Prepare promotional materials and press releases.

PERFORMANCE CRITERIA

Promotional materials and press releases are prepared based on meeting objectives.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of promotional materials and press releases to be prepared.

PERFORMANCE ELEMENTS

1. Review objectives, program, exhibitors and scheduled entertainment.
2. Identify special location and site enhancements to be promoted.
3. Create copy that is concise and specific.
4. Emphasize personal benefits of attendance through graphics, language and color.
5. Keep theme and logo(s) consistent throughout all mediums (e.g., direct mail, press releases, broadcast media, etc.).
6. Simplify registration by accepting credit cards for payment.
7. Include contact information on registration form for meeting-related questions.
8. Include promotional messages from respected third party such as association leadership.
9. Prepare press release.
   a. Find newsworthy angle.
   b. Customize for each audience.
   c. Use appropriate quotes from industry sources or prominent figures.
10. Summarize contents of release in headline or news lead.
11. Issue press releases before and after meeting/convention.
12. Time press releases prior to closing dates of target publications.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Promotional materials and press releases are prepared for distribution.

PROCESS

All performance elements for preparing promotional materials and press releases are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SET UP PRESSROOM.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

- Media list
- Volunteer list
- Meeting program
- Location of designated room
- Printed materials for media/journalists
- Location of telecommunications hookups

WORK TO BE PERFORMED

Set up pressroom

PERFORMANCE CRITERIA

Pressroom is set up with adequate space, equipment, printed materials and supplies for journalists and media persons covering meeting.

Time required to complete the skill varies depending on number of media persons to be accommodated.

PERFORMANCE ELEMENTS

1. Plan for pressroom when making other arrangements with meeting facility.
2. Arrange for a large enough space for media to work as well as conduct interviews with speakers and association officers.
3. Supply pressroom with adequate table space well stocked with biographical information and photographs, copies of speeches and press kits.
4. Provide telephones and computer hookups.
5. Schedule adequate staff and volunteers to work in pressroom during meeting.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Pressroom is set up to meet needs of journalists and media

PROCESS

All performance elements for setting up pressroom are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Printed materials budget
Address numbers from mailing lists
Graphic artist
Printer bids
Convention logo
Computer/printer/manuals

WORK TO BE PERFORMED

Prepare printed materials needed for meeting.

PERFORMANCE CRITERIA

Printed material is prepared on time and within budget guidelines.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on printed materials needed for meeting.

PERFORMANCE ELEMENTS

1. Review budget to make certain it is adequate to produce printed materials needed for meeting.
2. Keep theme and logo(s) consistent throughout all mediums (e.g., direct mail, press releases, broadcast media, etc.).
3. Prepare drafts of printed materials which usually includes the following:
   a. Letters and brochures promoting attendance at meeting.
   b. Pre-registration and housing forms
   c. Invitations
   d. Official programs of meeting
   e. Badges
   f. Tickets
   g. Registration and housing forms to be used on-site
   h. Newsletters or newspapers to be produced at meeting
   i. Registration lists
4. Develop design elements and work with a graphic artist for print work, making sure meeting/convention logo is included on all appropriate materials.
5. List items to be printed.
6. Develop list of printing specifications in consultation with graphic artist. (Use last year's materials as basis for soliciting bids if graphic artist isn't being used.)
7. Solicit bids for printing.
8. Review bidder qualifications.

9. Monitor delivery schedules.
10. Inspect completed samples before finalizing printing and distribution.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

All printed materials are prepared for meeting.

PROCESS

All performance elements for preparing printed materials are critical and must be performed in sequence.

SET UP SCHEDULE FOR BRIEFINGS.

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

List of previously established meeting requirements
Function sheets (event orders)
Computer/printer/manuals

WORK TO BE PERFORMED

Set up schedule for briefings.

PERFORMANCE CRITERIA

Briefings are scheduled to review, discuss and reconfirm last minute adjustments. Allow adequate time to review all meeting details including events and setups.

Skill is performed with 100% accuracy.

Time required to complete the skill varies depending on number of briefings needed.

PERFORMANCE ELEMENTS

1. Contact on-site management/convention services manager and establish a pre-convention briefing schedule.
2. Schedule first meeting 12 months prior to meeting; thereafter, meetings or conference calls should be scheduled at regular intervals depending on complexity of event.
3. Put all specifications in writing after speakers have provided their specific requirements.
4. Send photocopies of function sheets (event orders), well in advance of meeting, to convention services manager for distribution to other appropriate facility personnel and outside suppliers. Include the following in event orders:
   a. Group name and coding for each function
   b. Day, date and time of event
   c. Number of speakers
   d. Time function begins and ends
   e. Scheduled setup time
   f. Room setup
   g. Staging
   h. Audiovisual requirements,
   i. Special requirements (e.g., floral arrangements, computers, etc.)
   j. Signage
   k. Food and beverage needs
   l. Scheduled breaks for refreshing room
   m. Name of staff member in charge
   n. Room diagrams
   o. Special services and facilities required.

5. Review meeting details with facility personnel ((e.g., in person, in writing, by phone, etc.) with written follow-up at least 30 days before meeting.
6. Schedule on-site briefing to include the following people:
   a. Convention services manager
   b. Site manager
   c. Outside suppliers
   d. Convention bureau representative (if necessary)
   e. Others, such as reservations manager and head houseman
   f. Catering director
   g. Association staff members
   h. Front office manager

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Briefing schedule is set up.

PROCESS

All performance elements for setting up briefing schedule are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

PRE-CONVENTION BRIEFINGS

SKILL STANDARD

CONDITIONS OF PERFORMANCE

Given the following:

Meeting manager/convention services manager
Event resume
Statement of facility's policy and procedures for meetings
Copies of previously established meeting agreements
Computer/printer/manuals

WORK TO BE PERFORMED

Conduct briefing meetings.

PERFORMANCE CRITERIA

Pre-convention briefing meetings are held to review and finalize meeting details according to event resume.

Skill is performed with 100% accuracy.

Time required to complete entire skill is four to six months.

PERFORMANCE ELEMENTS

1. Develop schedule for pre-convention briefings.
2. Meet with facility personnel to review event resume.
3. Finalize entire event resume with all parties providing service to event.

PERFORMANCE ASSESSMENT CRITERIA

PRODUCT

Briefing meetings are conducted.

PROCESS

All performance elements for conducting briefing meetings are critical. Performance elements are numbered to show an appropriate sequence for completing the skill; however, a different sequence may be used.

Academic Skills	Skills (and related knowledge) contained in the subject areas and disciplines addressed in most national and state educational standards, including English, mathematics, science, etc.
Assessment	A process of measuring performance against a set of standards through examinations, practical tests, performance observations and/or the completion of work portfolios.
Content Standard	A specification of what someone should know or be able to do to successfully perform a work activity or demonstrate a skill.
Critical Work Functions	Distinct and economically meaningful sets of work activities critical to a work process or business unit which are performed to achieve a given work objective with work outputs that have definable performance criteria. A critical work function has three major components: · **Conditions of Performance:** The information, tools, equipment and other resources provided to a person for a work performance. · **Work to Be Performed:** A description of the work to be performed. · **Performance Criteria:** The criteria used to determine the required level of performance. These criteria could include product characteristics (e.g., accuracy levels, appearance), process or procedure requirements (e.g., safety, standard professional procedures) and time and resource requirements. The IOSSCC requires that these performance criteria be further specified by more detailed individual performance elements and assessment criteria.
Credentialing	The provision of a certificate or award to an individual indicating the attainment of a designated set of knowledge and skills and/or the demonstration of a set of critical work functions for an industry/occupational area.
Illinois Occupational Skill Standards and Credentialing Council (IOSSCC)	Legislated body representing business and industry which establishes skill standards criteria, endorses final products approved by the industry subcouncil and standards development committee and assists in marketing and dissemination of occupational skill standards.
Industry	Type of economic activity, or product or service produced or provided in a physical location (employer establishment). They are usually defined in terms of the Standard Industrial Classification (SIC) system.

Industry Subcouncil	Representatives from business/industry and education responsible for identifying and prioritizing occupations for which occupational performance skill standards are adapted, adopted or developed. They establish standards development committees and submit developed skill standards to the IOSSCC for endorsement. They design marketing plans and promote endorsed skill standards across the industry.
Knowledge	Understanding the facts, principles, processes, methods and techniques related to a particular subject area, occupation or industry.
Occupation	A group or cluster of jobs, sharing a common set of work functions and tasks, work products/services and/or worker characteristics. Occupations are generally defined in terms of a national classification system including the Standard Occupational Classification (SOC), Occupational Employment Statistics (OES) and the Dictionary of Occupational Titles (DOT).
Occupational Cluster	Grouping of occupations from one or more industries that share common skill requirements.
Occupational Skill Standards	Specifications of content and performance standards for critical work functions or activities and the underlying academic, workplace and occupational knowledge and skills needed for an occupation or an industry/occupational area.
Occupational Skills	Technical skills (and related knowledge) required to perform the work functions and activities within an occupation.
Par Levels	Par refers to a specific quantity of items kept in stock to ensure efficient operation. Par levels are set by property and/or corporate management based on calculations of past usage and projected occupancy.
Performance Standard	A specification of the criteria used to judge the successful performance of a work activity or the demonstration of a skill.
Product Developer	Individual contracted to work with the standard development committee, state liaison, industry subcouncil and IOSSCC for the adaptation, adoption or development of skill standards content.
Reliability	The degree of precision or error in an assessment system so repeated measurements yield consistent results.

Skill	A combination of perceptual, motor, manual, intellectual and social abilities used to perform a work activity.
Skill Standard	Statement that specifies the knowledge and competencies required to perform successfully in the workplace.
Standards Development Committee	Incumbent workers, supervisors and human resource persons within the industry who perform the skills for which standards are being developed. Secondary and postsecondary educators are also represented on the committee. They identify and verify occupational skill standards and assessment mechanisms and recommend products to the industry subcouncil for approval.
State Liaison	Individual responsible for communicating information among all parties (e.g., IOSSCC, subcouncil, standard development committee, product developer, project director, etc.) in skill standard development.
Third-Party Assessment	An assessment system in which an industry-designated organization (other than the training provider) administers and controls the assessment process to ensure objectivity and consistency. The training provider could be directly involved in the assessment process under the direction and control of a third-party organization.
Validity	The degree of correspondence between performance in the assessment system and job performance.
Workplace Skills	The generic skills essential to seeking, obtaining, keeping and advancing in any job. These skills are related to the performance of critical work functions across a wide variety of industries and occupations including problem solving, leadership, teamwork, etc.

APPENDIX B

ILLINOIS OCCUPATIONAL SKILL STANDARDS AND CREDENTIALING COUNCIL

Margaret Blackshere	AFL-CIO
Skip Douglas	Lucent Technologies
Judith Hale	Hale Associates
Terry Hoyland	Caterpillar University Caterpillar, Inc.
Michael O'Neill	Chicago Building Trades Council
Janet Payne	United Samaritans Medical Center
Harold Reetz	Illinois Fertilizer & Chemical Association Potash and Phosphate Institute
Gene Rupnik	Hospitality Industry
Jim Schultz	Illinois Retail Merchants Association Walgreen Company

Dennis Albanese	Albanese Development Company
Linda Bacin	Vice President The Bacin Group
Robert Bleavins	President RBHotelier
John Draz	Chef - Instructor The Culinary School of Kendall College
Marie French	Committee Co-Chair President, Wayne Griffin Travel and Cruises
Mark Kaufman	Senior Manager of Community Employment & Training Marriott International
Nancy Kroll	Instructor St. Charles High School
George Macht	Associate Professor, Foodservice Administration College of DuPage
Ivan Matsunaga	Committee Co-Chair Vice President of Operations, Connie's Pizza
Larry Posen	Dining Services Director Roosevelt University
Tom Rivera	President, Greater Woodfield Convention and Visitor's Bureau
Charlie Robinson	Owner, Robinson's Ribs
Rick Roman	Owner, The Signature Room at the 95th
Sandra Timmerman	President Illinois Bed and Breakfast
Ruth Hicks	State Liaison Illinois State Board of Education
Debra Larson	State Liaison Illinois State Board of Education

APPENDIX D

MEETING PROFESSIONAL CLUSTER STANDARDS DEVELOPMENT COMMITTEE

Laurel Barnes, CMP	Senior Meeting Manager The Meeting Point
Becky Benner	Director of Catering The Springfield Hilton
Anna Marie D'Alessandro	Meeting Coordinator MHEDA
Rose Horcher	Director of Sales Expovision
Jay Kitterman	Director of Hospitality Programs Lincoln Land Community College
Andrea McGrath, CMP	Manager of Conference Services Kraft Food, Inc.
Clare Mulcahy	Charter Sales Manager Geneva Lake Cruise Line
Nancy Olson	Director of Meeting Services American College of Occupational & Environmental Medicine
Louise Pochelski, CMP	Director of Meeting Services Council of Logistics Management
Will Renken, CMP	Director of Sales & Marketing Indian Lake Resorts
Lisa Sykes, CMP	Director of Meeting Services AANS
Sharon Vojtek, CMP	Director, Event Excellence Department McCormick Place
William R. Host, CMP	Assistant Professor Manfred Steinseld School of Hospitality and Tourism Management
Marian Swisher	Product Developer
Ruth Hicks	State Liaison Illinois State Board of Education
Debra Larson	State Liaison Illinois State Board of Education

APPENDIX E

WORKPLACE SKILLS

A. Developing an Employment Plan	1.	Match interests to employment area.
	2.	Match aptitudes to employment area.
	3.	Identify short-term work goals.
	4.	Match attitudes to job area.
	5.	Match personality type to job area.
	6.	Match physical capabilities to job area.
	7.	Identify career information from counseling sources.
	8.	Demonstrate a drug-free status.
B. Seeking and Applying for Employment Opportunities	1.	Locate employment opportunities.
	2.	Identify job requirements.
	3.	Locate resources for finding employment.
	4.	Prepare a resume.
	5.	Prepare for job interview.
	6.	Identify conditions for employment.
	7.	Evaluate job opportunities.
	8.	Identify steps in applying for a job.
	9.	Write job application letter.
	10.	Write interview follow-up letter.
	11.	Complete job application form.
	12.	Identify attire for job interview.
C. Accepting Employment	1.	Apply for social security number.
	2.	Complete state and federal tax forms.
	3.	Accept or reject employment offer.
	4.	Complete employee's Withholding Allowance Certificate Form W-4.
D. Communicating on the Job	1.	Communicate orally with others.
	2.	Use telephone etiquette.
	3.	Interpret the use of body language.
	4.	Prepare written communication.
	5.	Follow written directions.
	6.	Ask questions about tasks.
E. Interpreting the Economics of Work	1.	Identify the role of business in the economic system.
	2.	Describe responsibilities of employee.
	3.	Describe responsibilities of employer or management.
	4.	Investigate opportunities and options for business ownership.
	5.	Assess entrepreneurship skills.
F. Maintaining Professionalism	1.	Participate in employment orientation.
	2.	Assess business image, products and/or services.
	3.	Identify positive behavior.
	4.	Identify company dress and appearance standards.
	5.	Participate in meetings in a positive and constructive manner.
	6.	Identify work-related terminology.
	7.	Identify how to treat people with respect.

G. Adapting to and Coping with Change	1. Identify elements of job transition. 2. Formulate a transition plan. 3. Identify implementation procedures for a transition plan. 4. Evaluate the transition plan. 5. Exhibit ability to handle stress. 6. Recognize need to change or quit a job. 7. Write a letter of resignation.
H. Solving Problems and Critical Thinking	1. Identify the problem. 2. Clarify purposes and goals. 3. Identify solutions to a problem and their impact. 4. Employ reasoning skills. 5. Evaluate options. 6. Set priorities. 7. Select and implement a solution to a problem. 8. Evaluate results of implemented option. 9. Organize workloads. 10. Assess employer and employee responsibility in solving a problem.
I. Maintaining a Safe and Healthy Work Environment	1. Identify safety and health rules/procedures. 2. Demonstrate the knowledge of equipment in the workplace. 3. Identify conservation and environmental practices and policies. 4. Act during emergencies. 5. Maintain work area. 6. Identify hazardous substances in the workplace.
J. Demonstrating Work Ethics and Behavior	1. Identify established rules, regulations and policies. 2. Practice cost effectiveness. 3. Practice time management. 4. Assume responsibility for decisions and actions. 5. Exhibit pride. 6. Display initiative. 7. Display assertiveness. 8. Demonstrate a willingness to learn. 9. Identify the value of maintaining regular attendance. 10. Apply ethical reasoning.
K. Demonstrating Technological Literacy	1. Demonstrate basic keyboarding skills. 2. Demonstrate basic knowledge of computing. 3. Recognize impact of technological changes on tasks and people.
L. Maintaining Interpersonal Relationships	1. Value individual diversity. 2. Respond to praise or criticism. 3. Provide constructive praise or criticism. 4. Channel and control emotional reactions. 5. Resolve conflicts. 6. Display a positive attitude. 7. Identify and react to sexual intimidation/harassment.
M. Demonstrating Teamwork	1. Identify style of leadership used in teamwork. 2. Match team member skills and group activity. 3. Work with team members. 4. Complete a team task. 5. Evaluate outcomes.

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